

1010 De La Gauchetière Street West, Mezzanine 100, Montreal, Quebec H3B 5J2
 Customer service: 1-877-463-7627
 Option 1: Business Development Option 2: Operational Support
 Fax: 1-866-771-7695

1 APPLICANT/ACCOUNT HOLDER/ANNUITANT INFORMATION

Mr. Ms. Other

Account No. Language: French English

Account holder(s) Social Insurance No./Federal Business No. Quebec Enterprise No.

Account holder(s) (cont.) Date of birth (yyyy/mm/dd) E-mail address

Street No. Street Name Apt.

City Province Postal Code

Area code Telephone No. (home) Area code Telephone No. (work) Ext. Area code Fax No.

2 ACCOUNT INFORMATION

Non-registered RRSP LIRA Locked-in RRSP

RRIF LIF RESP TFSA

FRVR REIR

Name of spouse (if contributions made by spouse)

3 INSTRUCTIONS CONCERNING REGISTERED PLAN

Source of deposit/Type of withdrawal (form to be completed)

New contribution Home Buyers' Plan (T1036) Transfer from a retirement savings plan (T2033)

Transfer of severance pay Lifelong Learning Plan (RC96) Transfer from a pension plan (T2151)

Taxed withdrawal Other:

Transfer from a registered retirement savings plan (T2033), indicate name or code of institution:

4 BANKING INFORMATION – Attach a specimen cheque

For purchases, redemptions, distributions, systematic investments and systematic withdrawals, I authorize National Bank Investments Inc. to debit and/or credit my account as stipulated below:

Institution No. Transit Account No.

Name of Institution

Address of Branch

5 PAYMENT TERMS AND CONDITIONS

Payment amount

In accordance with the declaration of trust, the annuitant requests that Natcan Trust Company make the following payments:
(Complete section 7B to indicate the payment terms.)

Minimum amount
 The annuitant requests the minimum amount to be determined according to: His/her age The age of his/her spouse, whose date of birth⁽¹⁾ is: YYYY MM DD

or Maximum amount (LIF and Locked-in RIF only) (The annuitant recognizes that this choice cannot be modified after the first RIF/LIF payment has been made.)

or Total Amount Per Selected Frequency \$⁽²⁾ GROSS NET

If the annuitant wants to change the payment amount, he/she must inform Natcan Trust Company of this new amount no later than January 1 of the year in which the change is to come into effect. The new amount will remain in effect until the annuitant notifies Natcan Trust Company of another change.

The annuitant agrees to provide, on request, proof of his/her age and, if applicable, of that of his/her spouse, as well as any other necessary information relating to the registration and administration of the Plan.

Payment terms and conditions

Payments are to start on: ⁽³⁾ Payment frequency: Annual Semi-annual Quarterly Monthly

(Please choose a date between the 5th and 31st of any month.) **Payments payable by:** Cheque Electronic deposit to account indicated in Section 4.

Income Tax (if additional taxes, please make a selection)

Taxes on the minimum amount

Additional taxes (in addition to mandatory taxes) } _____ % or _____ \$ (Provincial)

Total taxes (including mandatory taxes)⁽⁴⁾ } _____ % or _____ \$ (Federal) Minimum + Excess Excess

(1) Does not apply to LIFs in New Brunswick.
 (2) For LIFs, the amount must be between the minimum and maximum amounts.
 (3) Payments must begin no later than December 31 of the year following the date on which the RIF/LIF comes into effect.
 (4) In the case the requested benefits exceed the minimum amount, the tax rate (% or \$) must be equal or higher to the taxes prescribed by the law.

5 PAYMENT TERMS AND CONDITIONS (cont.)

TEMPORARY INCOME AND OTHER PAYMENTS

For Quebec, complete form "LIF Compliance Declarations (Quebec)" (15179-002)
 For Nova Scotia, Newfoundland and Labrador and Ontario, use the form prescribed by law.

ELECTION OF SPOUSE AS SUCCESSOR ANNUITANT (not applicable to LIFs/Locked-in RIFs/PRIFs)

When authorized by law, I hereby name my spouse as successor annuitant subject to the terms of the RIF, if he/she survives me. I reserve the right to revoke my decision as authorized by applicable laws. Note: In some provinces, a spouse can only be named as a successor annuitant via a will. If you do not wish to name your spouse as the RIF annuitant upon your death or if you choose to do so and your spouse pre-deceases you, the beneficiary designated in the plan will apply.

6 SYSTEMATIC INVESTMENTS/SYSTEMATIC WITHDRAWALS (1)

	New	Cancellation	Modification	Systematic investment	Systematic withdrawal	Date of 1st payment (yyyy/mm/dd)	Amount (\$)	Frequency	Company code	Product No.	Distributions (non-registered only)	
											Reinvested	Paid* \$25 minimum per fund
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						<input type="checkbox"/>	<input type="checkbox"/>

You can change the amount or the frequency of the withdrawals or you can cancel the plan at anytime. For more information on your right to cancel authorization for automated debits, please contact your financial advisor. You hereby agree to hold National Bank Investments harmless in the event the revocation is not complied with except in the case of gross negligence on the part of NBI.

You have certain rights if a systematic investment debit is not in compliance with this systematic investment plan. For example, you are entitled to a refund for any debit that is not authorized or compatible with this systematic investment plan. For more information on your rights of recourse, please contact your financial advisor.

7 TRANSACTIONS

A) PURCHASE					Purchase payable by:	B) PAYMENT TERMS				Percentage applicable to payment
Fund No.	Amount (\$)	%	Initial sales charge %			Fund No.	Amount (\$)	%		
1.					<input type="checkbox"/> Client's bank account (section 6) <input type="checkbox"/> By cheque	1.				100%
2.						2.				
3.						3.				
4.						4.				
5.						5.				
6.						6.				
7.						7.				
8.						8.				

* Not applicable to some investments. Please refer to the simplified prospectus for details.

C) REDEMPTION				Full redemption	Redemption payable by:
Fund No.	Amount (\$)	%			
1.				<input type="checkbox"/> Deposit to bank account <input type="checkbox"/> Cheque delivered to applicant	
2.			<input type="checkbox"/>		
3.			<input type="checkbox"/>		
4.			<input type="checkbox"/>		
5.			<input type="checkbox"/>		
6.			<input type="checkbox"/>		
7.			<input type="checkbox"/>		
8.			<input type="checkbox"/>		

D) TRANSFER FROM:							TO:	
Account No.	Fund No.	Amount (\$)	%	Transfer in full		Monthly systematic transfer	Account No.	Fund No.
				Fund	Account			
1.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1.	
2.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2.	
3.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.	
4.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.	
5.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5.	
6.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6.	
7.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7.	
8.				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8.	

8 REPRESENTATIVE INFORMATION

First Name _____	Dealer's name _____		
Surname _____	Dealer's No. _____	Representative's No. _____	Area Code Telephone No. _____
Representative's e-mail _____	Area Code Representative's Fax No. _____		

I hereby declare that I have ascertained the identities of the persons whose signatures appear as account holder by examining the original documents provided in compliance with the standards established by the *Proceeds of Crime (Money Laundering) and Terrorist Financing Act*. I have made reasonable efforts to determine if the account holder is acting on behalf of a third party.

Date (yyyy-mm-dd) _____	Authorized signature of Representative X _____
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9 AUTHORIZATION *Please read carefully before signing*

I request that National Bank Investments Inc. ("NBII") purchase, redeem or exchange units/shares of the investment as indicated.

I understand that these transactions are made under the terms set out in the prospectus. I understand that mutual funds are not guaranteed and their values change frequently.

I understand that the benefits of the retirement income or other payments from this Plan will be subject to tax. All contributions paid into the Plan shall be invested by NBII upon my instructions according to the conditions of the Plan and kept in my account subject to the provisions of the Plan.

By signing below, I waive my right to receive a notice concerning the amount debited for the systematic investment plan, and I hereby declare not requiring a notice concerning the amount debited for the systematic investment plan before the debit is processed. I also waive my right to receive a notice for any change to the debit amount or dates I requested.

Date (yyyy-mm-dd) _____	Signature of Applicant/Annuitant X _____	Signature of Co-Applicant (if applicable) X _____
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Accepted by National Bank Investments Inc. as agent for Natcan Trust Company as Trustee (applicable to registered accounts only).

Authorized signature
X Jonathan Durocher