

## e-Signature – List of Accepted Sun Life Guaranteed Investment Fund Documents

| Documents that will be accepted:   |            |  |
|--|------------|--|
| Applications:  | Wet        | eSignature   |
| Non-registered / registered / locked-in (4601)<br>Tax-Free savings account (TFSA) (4602)<br>Nominee & intermediary (4603)<br>Request to Add Estate and/or Income Series (4604)<br>International tax classification for an entity (4545)<br>International tax self-certification for individuals (4573) | Acceptable | Acceptable   |
| Personal information change:   |            |  |
| Personal information change or correction (4624)   | Acceptable | Acceptable   |
| Systematic Plans:  |            |  |
| Order ticket (4610)  | Acceptable | Acceptable <u>Only</u> for: <ul style="list-style-type: none"> <li>Deposits</li> <li>PAC</li> <li>Fund switches/automatic fund switches including dollar cost average/transition</li> <li>Withdrawals</li> <li>SWP</li> <li>Banking Information</li> </ul> |
| Transfer Forms:  |            |  |
| Transfer authorization for non-registered Investments (4621)<br>Transfer authorization for registered investments (4622)   | Acceptable | Acceptable   |

*Where a signature guarantee is required in our current process, the e-signature will not replace the signature guarantee. Therefore, a signature guarantee is required in addition to the e-signed doc.*