

Important: Fill out in block letters and answer each section as accurately as possible.

Section A – Policyholder (annuitant) information

Contract n° _____ Certificate n° _____
 First name _____ Last Name _____

Section B – Details of the request

☐ Initial deposit ☐ Transfer of a GIC-type product ☐ Renewal

1. Estimated date of availability of funds | Y | Y | Y | Y | M | M | D | D |

2. Renewal Date | Y | Y | Y | Y | M | M | D | D |

3. Invested Amount (minimum \$1,000) \$ _____

I hereby request **WPF Investment.** to reinvest the invested amount mentioned above, including interests credited on _____
 expiry date, for years and to guarantee the interest rate of _____ %

☐ Compound

☐ Simple

☐ Portfolio Rate (Specify the total amount of the portfolio) \$ _____

Section C – Signatures

I understand and agree that **WPF Investment.** reserves the right to cancel this agreement if it is not received at its Head Office the working day next following the date of its signature. In such a case, the rate granted could be the one in effect at the time the agreement was received and not the one requested, regardless of whether there has been a rate increase or decrease.

Signed at _____ | Y | Y | Y | Y | M | M | D | D |

X _____ **X** _____
 Signature of Policyholder (Annuitant) Signature of the advisor

No agreement of rate guarantee may be presented **more than 45 days before renewal date.**

Section D – Rate Guarantee Procedure

*WPF Investment. accepts electronic signatures on PDF applications for investments under certain conditions. Please review the specific measures regarding e-signatures in the Investment-Retirement section of our website.

Renewal	Transfer	New deposit	
Valid (calendar days)			
45 days	45 days	15 days	
Requirements		By cheque	By PAD
Client's signature (original is not required) on an instruction letter or on our form "Agreement to guarantee Interest Rate". OR Email from the advisor to ir.investment@wpfinvestment.com mentioning client's name, chosen product and term.	Copies of the application and transfer form with wet signature OR PDF with electronic signature*, by email/fax with contract number if applicable (additional deposit). OR PDF application with electronic signature*, and of the cheque, by email/fax with contract number if applicable (additional deposit). OR Email to ir.investment@wpfinvestment.com mentioning client's name, amount to be received, chosen product and rate requested, expected date of receipt of funds and the delivering institution. The deposit (transfer cheque) must be received at our offices within 45 days of the guarantee rate request and be cashable within this period.	Copies of the application with wet signature. OR PDF application with electronic signature*, and of the cheque, by email/fax with contract number if applicable (additional deposit). OR Email to ir.investment@wpfinvestment.com mentioning client's name, amount to be received, chosen product and rate requested, and expected date of receipt of funds. The original application (in paper format with wet signature) must be mailed with the cheque. All documents must be received at our offices within 15 days of the guarantee rate request. The cheque must be cashable within this period.	Copies of the application with wet signature. OR PDF application with electronic signature* and of the pre-printed cheque specimen, by email/ fax with contract number if applicable (additional deposit). OR Email to ir.investment@wpfinvestment.com mentioning client's name, chosen product and rate requested. The duly completed documents must be received within 15 days of the guarantee rate request and the debit must be made within this period.
Confirmed rates			
The highest between the guaranteed rate and the rate in effect on the date of renewal.	The highest between the guaranteed rate, the rate in effect on the date of receipt of the application (wet signature or PDF with electronic signature*) and the rate in effect on the date of receipt of the deposit.	The highest between the guaranteed rate, the rate in effect on the date of receipt of the documents or the highest rate between the date of the rate and the date of reception of documents.	