Member Asset Mix Request

Member Information (please print)

Name of employer/plan sponsor		Policy/plan number
Member name (Last / First / Middle)	Member key	Effective date (mm / dd / yyyy)

Details of the Asset Mix (please print)

Please select the appropriate fund(s) and amounts/percentages for which the money is to be invested.

Fund		Amount	or	Percentage
	$			%
	$			%
	$			%
	$			%
	$			%
	$			%
	$			%
	$			%
	$			%
Total	$			100%

Contribution Source (see below): _____ Contribution Type (see below): _____

Notes:
- Market-based funds do not contain any rate or principal guarantees.
- For BGI funds, there is a minimum deposit of $25 per fund.

Agreement and Signature

I understand that the information furnished on this form will be used by CUMIS to administer the retirement plan in which I participate, and for such lawful purposes in accordance with federal and provincial laws, as may apply.

Member signature	Date of signing (mm / dd / yyyy)

Codes

Contribution Source:

mem	Member Contribution
com	Company Contribution
both	Both Member and Company

Contribution Type:

01	Regular/Required Contribution
05	Voluntary
06	Transfer (locked-in)
07	Transfer (non-locked-in)
99	All the above

CUMIS®
RETIREMENT SERVICES

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