

**Other QUICK and EASY way to enrol:**

› **ONLINE:** [ia.ca/enrolnow](http://ia.ca/enrolnow) using your plan identification code: 15120CM001PJ

**ENROLMENT**

Simplified Pension Plan (SPP)

Need help?  
1-800-567-5670

**1. Your group savings and retirement plan**

Name of your employer or your plan sponsor CPIEPQ		
Contract number 15120-CM	Division number 001	Class number 01

**2. Your personal information**

Last name		First name	
Social Insurance Number		Date of birth YYYY-MM-DD	Sex Female <input type="checkbox"/> Male <input type="checkbox"/>
Mailing address (number, street and apartment)			
City		Province	
Country	Postal code	Telephone No. ( )	
Email address		Language French <input type="checkbox"/> English <input type="checkbox"/>	

**Electronic communications agreement**

**How would you like to receive your statements and other communications regarding your group savings and retirement plans?**

- I accept to receive them by email or via My Client Space, our secure website. I will be notified by email when they are available.
- By mail.

**Do you want to receive by email the Group Savings and Retirement eNewsletter from Industrial Alliance Insurance and Financial Services Inc.?**

- Yes, I accept to receive it by email. This eNewsletter provides information about retirement planning.
- No.

By accepting to receive the communications by email, I agree to check my email and send Industrial Alliance Insurance and Financial Services Inc. any change in my email address. If changes are not communicated, Industrial Alliance Insurance and Financial Services Inc. cannot be held responsible for not transmitting the information through electronic communications. Industrial Alliance Insurance and Financial Services Inc. can mail me any documents that could not be transmitted electronically if required by law, if judged appropriate or if requested by myself upon payment of appropriate fees. This consent shall enter into force as of the date it is received and applies to all the group savings and retirement plans that I have with Industrial Alliance Insurance and Financial Services Inc.. For additional information, contact Industrial Alliance Insurance and Financial Services Inc. in writing or by email at [pension@ia.ca](mailto:pension@ia.ca).

**Note: You will be able to unsubscribe from receiving electronic communications and eNewsletters at any time.**

**Your plan requires information about your spouse.**

Marital status  
Single  Married  Common-law spouse  Civilly united (Quebec)

**If you have checked a box other than "Single", please complete the following fields.**

Your spouse's last name	Your spouse's first name	Your spouse's date of birth YYYY-MM-DD	Your spouse's sex Female <input type="checkbox"/> Male <input type="checkbox"/>
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### 3. Your employment information (optional)

You are not required to fully complete this section if you do not have the information requested.		
Hire date  YYYY-MM-DD	Province of employment	Plan membership start date Vous devez avoir rempli les conditions d'admissibilité avant de pouvoir participer au régime. Consultez votre employeur pour connaître ces conditions.  YYYY-MM-DD

## Solutions available

### a) Pre-Built

Choose a pre-built portfolio depending on what age you plan to retire and on your investor profile.

To help you establish your profile, complete the *Your Investor Profile* questionnaire.

OR

### b) Build Your Own

You choose from all the investment funds available under your plan and build your own portfolio.

**Choose only one solution.**

If you select both, we cannot process your investment instructions.

**Did you know** that your investment choice applies to your contributions and those your employer makes? Call us at 1-800-567-5670 if you want to have this changed.

## 4. Your investment instructions

### Your Range of Investment Options

For more information about the investment options available in your plan, please refer to *Your Range of Investment Options* document.

**CHOOSE ONLY ONE OF THE FOLLOWING SOLUTIONS: PRE-BUILT OR BUILD YOUR OWN**

#### a) Pre-Built Solution

##### Metallos Portfolios

The investment solution that evolves depending on your life cycle and your investor profile. For more information about Metallos Portfolios, see the *Your Range of Investment Options* document.

**At what age do you plan to retire?** \_\_\_\_\_

If no age is specified, the normal retirement age of 65 will be used.

**Your investor profile** (check one box only):

Prudent

Balanced

Growth

**OR**

#### b) Build Your Own Solution

Choose your investments and build your own portfolio in line with your investor profile.

Fund Name	Fund Code	Percentage
<b>Income Funds</b>		
Money Market	070	%
Short Term Bond	170	%
Emerald Canadian Bond Index (TD)	489	%
Bond	020	%
Bond (Fiera Capital)	472	%
Core Plus Bond (PH&N)	632	%
Core Plus Bond (PIMCO)	860	%
Global Fixed Income (PIMCO)	893	%
<b>Diversified Funds</b>		
Diversified	040	%
Diversified Prudent Metallos	849	%
Diversified Balanced Metallos	850	%
Diversified Growth Metallos	851	%
<b>Canadian Equity Funds</b>		
Canadian Equity Index (TD)	753	%
Dividend	160	%
Canadian Equity (Beutel Goodman)	752	%
Fidelity Canadian Focused Equity	871	%
Canadian Equity Low Volatility (TD)	888	%
Canadian Equity Growth	464	%
Canadian Equity (Jarislowsky)	488	%
Cdn Equity Small Cap (Montrusco)	511	%
Canadian Equity Small Cap (QV)	541	%
<b>Foreign Equity Funds</b>		
Global Equity Index ACWI (BlackRock)	876	%
Global Equity	707	%
Global Equity (Hexavest)	500	%
Global Equity (C\$-Hedged) (Hexavest)	865	%
Global Equity (QV)	534	%
Global Equity (Templeton)	465	%
Global Equity Low Volatility ACWI (TD)	886	%
Global Equity (Mawer)	133	%
Global Equity Small Cap (Deutsche AWM)	531	%
International Equity Index (BlackRock)	300	%

Upon maturity of your guaranteed investments, the capital and interest will be reinvested in the same guaranteed investment term. Should you wish to reinvest them differently, please contact us at 1-800-567-5670.

<b>Foreign Equity Funds</b>		
International Equity	706	%
International Equity (Hexavest)	852	%
U.S. Equity Index (BlackRock)	760	%
U.S. Equity	705	%
U.S. Equity (Mawer)	132	%
U.S. Equity Core (MFS)	513	%
<b>Alternative/Specialty Funds</b>		
Fidelity Global Real Estate	540	%
Global Infrastructure (Lazard)	757	%
Canadian Resources (Invesco)	892	%
<b>Guaranteed Income Investments</b>		
Daily Interest		%
1-year guaranteed investments		%
2-year guaranteed investments		%
3-year guaranteed investments		%
4-year guaranteed investments		%
5-year guaranteed investments		%
6-year guaranteed investments		%
7-year guaranteed investments		%
8-year guaranteed investments		%
9-year guaranteed investments		%
10-year guaranteed investments		%
<b>Total (must equal 100%)</b>		<b>100%</b>

I wish to activate the **rebalancing service of investment funds** (not available for guaranteed investments).

**What are the benefits of the rebalancing service?**

The automatic rebalancing service periodically adjusts the allocation of your investments to keep it in line with your investment instructions. With stock market fluctuations, your investment allocation will likely stray over time from the target distribution you defined in your investment instructions. As a result, you could end up with a portfolio that no longer reflects your investment goals, with a higher or lower risk level than you initially intended. With the automatic rebalancing service, the allocation of your investments is periodically adjusted to stay within the parameters established in your investment instructions. **The rebalancing service of investment funds will not be activated without instructions on your part.**

If you do not select an investment option, contributions will be invested according to the instructions specified in your plan, if such instructions exist. Otherwise, contributions will be deposited in the transitory account until valid instructions are received.

Please note that if amounts have already been deposited by your employer on your behalf in the plan you are currently enrolling in, these amounts will be invested according to the instructions specified in this form.

## 5. Your signature and other important information

### Personal Information

In order to ensure the confidentiality of your personal information in its possession, Industrial Alliance Insurance and Financial Services Inc. will establish a file for the purposes of providing you with financial products and services. Your file will contain information about your application for the group savings and retirement plan as well as information about any request concerning the execution of this plan. Access to this file is limited to Industrial Alliance Insurance and Financial Services Inc. employees and agents responsible for file management, to persons you have authorized, and to persons legally entitled to do so.

Your file will be kept in Industrial Alliance Insurance and Financial Services Inc. offices. You have the right to access the personal information contained in your file, as well as to have any erroneous information corrected that you are unable to change directly on the Industrial Alliance Insurance and Financial Services Inc. website or by any other means. To do so, you must send a request in writing to the following address:

Industrial Alliance Insurance and Financial Services Inc.

Privacy Officer, PO Box 1907, Station Terminus, Quebec City, QC G1K 7M3

IA Financial Group, its affiliates and their agents can access information about me in order to know me better, better meet my needs and offer the best possible service and client experience. (If you do not wish to grant access to this information, please call us at 1-800-567-5670.)

### I, the undersigned, hereby:

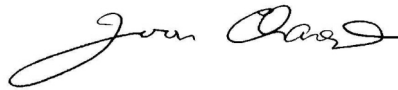
- affirm that all statements provided in the following document are true and complete.
- appoint my employer as agent, if applicable, and authorize it to act on my behalf to deduct contributions from my salary as stipulated in the plan and I appoint the contractholder or sponsor, as the case may be, as the authorized agent to act on my behalf for the purposes of my participation in the plan, notably for collecting and submitting contributions as set forth in the plan, determining default investment instructions and applying such instructions to my investments if I fail to provide any investment instructions and such default instructions have been determined.
- confirm that I understand and accept the conditions applicable to the present contract and my responsibilities, and that I wish to enrol in the contract.
- if I fail to provide transfer or reimbursement instructions within the allotted time after my participation in the contract ends, I request that Industrial Alliance Insurance and Financial Services Inc. have a group RSP registered in my name, if necessary, as a registered retirement savings plan of which I will be the annuitant under the federal *Income Tax Act* and, if applicable, that this group RSP be locked in under the provisions of any applicable legislation.
- consent to the exchange and communication of my personal information between Industrial Alliance Insurance and Financial Services Inc., the employer or plan sponsor and their authorized agents, including all representatives or brokers, for the purposes of administering the contract and the services provided under the contract, and I authorize the collection, use and communication of my personal information by Industrial Alliance Insurance and Financial Services Inc. for these purposes.
- confirm having read and understood the disclosure documents regarding this plan, including the information regarding investment options and applicable interest rates before selecting my investment instructions, and I understand my responsibilities.

YYYY-MM-DD

Signature

Date

To be valid, your enrolment form must be signed.



**Yvon Charest**

President and Chief Executive Officer  
Industrial Alliance Insurance and Financial Services Inc.



**Jennifer Dibblee**

Corporate Secretary  
Industrial Alliance Insurance and Financial Services Inc.

### What's next?

#### ① Where to send your documents?

Send both your enrolment form and beneficiary designation form to the following address:

Industrial Alliance Insurance and Financial Services Inc.  
Group Savings and Retirement  
1080 Grande Allée West  
PO Box 1907, Station Terminus  
Quebec City, QC G1K 7M3  
Fax: 1-800-786-6065  
pension@ia.ca

#### ② What will the next steps be?

You will receive a letter by mail for your records confirming your enrolment in the group savings and retirement plan. You will also receive by mail the information required to access My Client Space, our secure website and view your account information safely online.

