

## INVESTMENT ORDER FORM

**Client Information:**  Mr.  Mrs.  Ms.  Dr.  Company

Surname \_\_\_\_\_ First Name and Initials \_\_\_\_\_  
 Date of Birth (dd/mm/yy) \_\_\_\_\_ Social Insurance Number (Req. by CRA) \_\_\_\_\_  
 Phone \_\_\_\_\_  Home  Work  Mobile

**Joint / Spousal Information (if applicable):**  Mr.  Mrs.  Ms.  Dr.

Surname \_\_\_\_\_ First Name and Initials \_\_\_\_\_  
 Date of Birth (dd/mm/yy) \_\_\_\_\_ Social Insurance Number (Req. by CRA) \_\_\_\_\_  
 Check one of the following:  
 1.  New Account – application attached  
 2.  No changes to KYC  
 3.  Changes to KYC – updated application attached

**Account Type:**

R.R.S.P.  Non-Registered  R.R.I.F.  T.F.S.A.  Other \_\_\_\_\_  
 L.I.R.A.  Spousal  R.E.S.P.  Intermediary (Self Directed)  
 Name \_\_\_\_\_ Account Number \_\_\_\_\_

Fund Name	Fund Number	DSC, LL or FE %	Account Number	PAC	Amount	%	Buy / Sell	Wire Order Number

**Forms Attached:**

Account Application  Cheque / Void Cheque  T2033 / T2151 Transfer  PAC / SWP / RRIF Forms  Other \_\_\_\_\_  
 If Other please specify

**Special Instructions:** \_\_\_\_\_

\*I acknowledge receipt of the current Fund Fact sheet for the above funds(s). I received a copy of the Dealer Disclosure Document and I declare that I understand it and agree with the changes, terms, conditions, provisions and contents therein.

Signed At \_\_\_\_\_ Dealer # **9929** Rep # \_\_\_\_\_  
 Client Signature \_\_\_\_\_ (dd/mm/yy) \_\_\_\_\_ Advisor Name (Print) \_\_\_\_\_  
 Joint Signature \_\_\_\_\_ (dd/mm/yy) \_\_\_\_\_ Advisor Signature \_\_\_\_\_ (dd/mm/yy)  
 Processing \_\_\_\_\_ (dd/mm/yy) \_\_\_\_\_ Accepted at CFG by \_\_\_\_\_ (dd/mm/yy)