



SunWise®, SunWise® Elite, SunWise® Essential Series
and SunWise® Essential Series 2
Registered Owner Change Form



Authorization to Change Registered Owner from Client to Nominee or from Nominee to Client

TO: CI Investments Inc.

RE: SunWise Policy Number _____ (the "Policy")

You are hereby authorized and directed to modify your records to change the registered owner of the Policy from:

_____ to _____
(Name of existing registered owner) (Name of new registered owner)

I confirm that all other terms and conditions of the policy will remain the same, including the beneficiary designation.*

*Please note that for registered plans, the beneficiary designation may change when transferring to/from a Nominee account.

Beneficiary designation: Please complete for Registered Plans when transferring from Nominee to Client only. For Registered Plans when transferring from Client to Nominee the beneficiary designation is revoked and will be held at the Nominee.

The Owner reserves the right to revoke the beneficiary, unless the owner designates the beneficiary as irrevocable. The following person(s) is (are) appointed as the beneficiary(ies) of the Contract in the event of the death of the Annuitant. If the Primary Beneficiary is no longer living at the time of death of the Annuitant, the Contingent Beneficiary becomes the Beneficiary. **Relationship of the beneficiary must be to the Annuitant unless the Contract was signed in Quebec where the relationship of the beneficiary must be to the Contract Owner and the designation of a spouse as beneficiary is irrevocable unless the Owner checks revocable here:** ☐ revocable

Primary Beneficiary Name(s)	Relationship	Share (%)	Contingent Beneficiary Name(s) (for the adjacent share)	Relationship

If LIRA, LIF, LRIF or PRIF the beneficiary designation may not be valid if you have a spouse that you did not declare as beneficiary.

DATED: ____ Y Y Y Y / M M / D D

Witness

Name of beneficial owner(s):

X MANDATORY

Signature(s) of beneficial owner(s):

Signature/stamp of Nominee/Intermediary

X

Signature of Irrevocable Beneficiary (If applicable)

Note: This authorization must be signed by the beneficial owner(s) of the Policy. In most cases this will be the person(s) who signed the application unless they have transferred all of their ownership rights in the Policy to another person(s). For Registered Plans when transferring from Nominee to Client, the Nominee has authorization to sign on behalf of the Trustee.