Family Group Maintenance Form

Complete this form to remove one or more accounts from a Family Group.

If additional space is required, please attach a separate page.

Reset form

1 | Remove account(s) from the Family Group

☐ **Remove all accounts.** To remove all accounts from an existing Family Group, indicate an account number belonging to the Family Group below.

CI or dealer account number

☐ **Remove specific account(s)**. To remove specific accounts from an existing Family Group, indicate the account(s) to be removed below.*

CI or dealer account number	Name of Account Holder(s)	Plan Type

*Please note that accounts belonging to the same individual will be automatically relinked on a quarterly basis in the last month of each quarter.

2 | Advisor Authorization

By signing below, the advisor or dealer representative (i) is acknowledging the terms as set out in Section 3 and (ii) is confirming that he or she has received instructions from his or her client(s) and is directing CI Investments Inc. to act on them.

Name of Advisor | Dealer code | Advisor code

Advisor signature | Date | Nominee authorization (if applicable)

3 | Advisor Acknowledgment

By signing this form, the advisor or dealer representative:

- confirms that he or she has explained to his or her client(s) that removing account(s) from the Family Group may affect the fee reductions to be applied;
- acknowledges that it is his or her responsibility to ensure that this form is completed correctly;
- acknowledges that CI will remove account(s) from a Family Group as directed herein after the date of receipt of this form in good order;
- acknowledges that removing account(s) from the Family Group will also remove such account(s) from Consolidated Reporting (if selected).

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