

## SunWise Elite Including SunWise Elite Plus

### Client Elected Target Fund for Fixed Income Rebalancing Form

Please complete and return this form to establish the client elected target fund. This election will apply for any future monthly or semi-annual rebalancing.

Fixed Income Rebalancing will be completed periodically to maintain a 30% Fixed Income Weighting in the account, as per our current rebalancing procedures. By electing a target fund, any time rebalancing occurs the money will be rebalanced into the target fund elected, instead of the default procedure.

This form is not to be used to process a switch, reclassification or transfer.

<b>1 Contract Details</b>	SunWise Elite Contract Number _____ Distributor's Account Number _____												
<b>2 Owner Information</b>	_____ Owner's Name (last, first, middle)  _____ Joint Owner's Name (last, first, middle)												
<b>3 Client Elected Target Fund</b>  Any Fixed Income Rebalancing will be rebalanced into the 100% Fixed Income Weighted target fund elected.  Note: Only <u>one</u> fund can be elected.	<input type="radio"/> SunWise Elite Signature Canadian Bond Fund <input type="radio"/> SunWise Elite TD Canadian Bond Fund <input type="radio"/> SunWise Elite Money Market <input type="radio"/> SunWise Elite CI Signature Corporate Bond Corporate Fund <input type="radio"/> SunWise Elite Select Income Advantage Managed Fund (SunWise Elite PSS 100i)												
<b>4 Owner Authorization</b>	<p><b>Your signature below confirms that you understand that:</b></p> <ul style="list-style-type: none"> <li>- I (We) hereby authorize CI Investments Inc. to automatically rebalance my (our) SunWise Elite Contract.</li> <li>- all proceeds from the rebalancing will be deposited into the fund elected.</li> <li>- the load type of fund being rebalanced out of, will determine the load type of the client elected target fund.</li> <li>- on a non-registered policy, the rebalancing will trigger a disposition for taxes purposes.</li> </ul> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"><b>X MANDATORY</b></td> <td style="text-align: right;">YYYY/MM/DD</td> </tr> <tr> <td>Owner's Signature</td> <td style="text-align: right;">Date</td> </tr> <tr> <td><b>X MANDATORY</b></td> <td style="text-align: right;">YYYY/MM/DD</td> </tr> <tr> <td>Joint Owner's Signature</td> <td style="text-align: right;">Date</td> </tr> <tr> <td style="text-align: right;">_____</td> <td style="text-align: right;">YYYY/MM/DD</td> </tr> <tr> <td>Authorized Representative's Signature (as per Limited Trading Authorization, if applicable)</td> <td style="text-align: right;">Date</td> </tr> </table>	<b>X MANDATORY</b>	YYYY/MM/DD	Owner's Signature	Date	<b>X MANDATORY</b>	YYYY/MM/DD	Joint Owner's Signature	Date	_____	YYYY/MM/DD	Authorized Representative's Signature (as per Limited Trading Authorization, if applicable)	Date
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<b>5 Representative Authorization</b>	<p><b>Your signature below confirms you:</b></p> <ul style="list-style-type: none"> <li>- have received instructions from your client and direct us to act on the transaction requested and that you have disclosed the possible effects of the transaction requested to your client.</li> <li>- understand where a client disputes a transaction, all market risk or cost of a trade correction will be the responsibility of the representative where client signature has not been obtained.</li> </ul> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"><b>X MANDATORY</b></td> <td style="text-align: right;">YYYY/MM/DD</td> </tr> <tr> <td>Representative's Name</td> <td style="text-align: right;">Distributor and Representative Number</td> </tr> <tr> <td><b>X MANDATORY</b></td> <td style="text-align: right;">YYYY/MM/DD</td> </tr> <tr> <td>Representative's Signature</td> <td style="text-align: right;">Date</td> </tr> </table>	<b>X MANDATORY</b>	YYYY/MM/DD	Representative's Name	Distributor and Representative Number	<b>X MANDATORY</b>	YYYY/MM/DD	Representative's Signature	Date				
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