



EDGEPOINT

TRANSFER AUTHORIZATION FOR REGISTERED INVESTMENTS (RSP, RIF, TFSA, LIRA, LRSP, RLSP, LRIF, LIF, PRIF, RLIF) EdgePoint Wealth Management Inc. c/o Citigroup Fund Services Canada Ltd. 2920 Matheson Blvd East, Mississauga, Ontario L4W 5J4 Fax: 905.214.8100 or 1.866.877.9477 www.edgepointwealth.com

This form can be used for RSP to RSP transfers (except for transfers due to death), RSP to RIF transfers, RIF to RIF transfers, and TFSA to TFSA transfers.

Please note: The data entered on this form may be scanned and stored electronically. Please print neatly in the spaces provided to ensure completeness, accuracy and machine readability.

1. Annuitant Information

Mr. Mrs. Ms. Dr.

Preferred language of correspondence English or French

Last Name, First Name, Initial(s), Address, Social Insurance Number (Mandatory), City, Province, Postal Code, Home Telephone Number, Business Telephone Number, E-mail Address

2. Receiving Institution Information

For new accounts, please attach completed EdgePoint Account Application

EdgePoint Wealth Management Inc. c/o Citigroup Fund Services Canada Ltd. 2920 Matheson Blvd East Mississauga, Ontario L4W 5J4 EdgePoint Account Number, Registered Plan Type, Dealer Name, Dealer Number, Financial Advisor Name, Rep code, Telephone Number

Investment Instruction

Table with columns: Portfolio Name, Fund Number, Amount (\$), Amount (%), SC %, LL. Includes Special Instructions row.

Locked-in Confirmation

EdgePoint Wealth Management as agent for The Royal Trust Company as Trustee, agrees to administer all locked-in funds transferred under this transfer authorization in accordance with the governing legislation indicated in Section "5" below.

3. Client Direction to Relinquishing Institution

Relinquishing Institution Name, Address, Client Account Number, City, Province, Postal Code, Transfer (check one box only) All in cash, All assets, All in Kind, Partial

Table for investment details with columns: In Kind, In Cash, Investment Amount, Investment Description, Account Number or Policy Number

FOR USE BY RELINQUISHING INSTITUTION Delay Delivery Until DD/MM/YYYY

4. Client Authorization

I hereby request the transfer of my account and its investments as described above. I acknowledge that all investments in my EdgePoint RSP, or RIF or TFSA must be made through a registered Dealer and that the Dealer noted above is acting as my agent in this regard.

Irrevocable Beneficiary: I consent to the transfer of the account, Signature of Annuitant, Date, Signature of Irrevocable Beneficiary (if applicable), Date

5. For Use By Relinquishing Institution Only

Registered Plan, Spousal Plan, Contributor Last Name, First Name, Initial(s), Date of Birth, Social Insurance Number, Contact Name, Telephone Number, Fax Number, Authorized Signature, Date



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Table for investment details with columns: In Kind, In Cash, Investment Amount, Investment Description, Account Number or Policy Number. Includes FOR USE BY RELINQUISHING INSTITUTION section.

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5. For Use By Relinquishing Institution Only

Registered Plan: RRSP, RRIF, Qualified, Non Qualified, Spousal Plan, No, Yes - if yes, complete Contributor information, TFSA, LIRA, LRSP, RLSP, LRIF, LIF, PRIF, RLIF, Locked-in funds, Governing Legislation, Contributor Last Name, First Name, Initial(s), Date of Birth, Social Insurance Number, Contact Name, Telephone Number, Fax Number, Authorized Signature, Date



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Relinquishing Institution Name, Address, Client Account Number, City, Province, Postal Code, Transfer (check one box only) All in cash*, All assets*, All in Kind, Partial*

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E D G E P O I N T

EdgePoint Portfolios: Quick Reference

FUNDSEV MANAGEMENT COMPANY CODE: EDG

EDGEPOINT PORTFOLIOS	SERIES	FUND NUMBER (C\$)	Non-HST		SALES CHARGE OPTION
			SERIES	FUND NUMBER (C\$)	
EdgePoint Global Portfolio	A	100	A (N)	1001	FE*
	B	300	B (N)	3001	LL**
	F	500	F (N)	5001	-
EdgePoint Global Growth & Income Portfolio	A	180	A (N)	1801	FE
	B	380	B (N)	3801	LL
	F	580	F (N)	5801	-
EdgePoint Canadian Portfolio	A	108	A (N)	1081	FE
	B	308	B (N)	3081	LL
	F	508	F (N)	5081	-
EdgePoint Canadian Growth & Income Portfolio	A	188	A (N)	1881	FE
	B	388	B (N)	3881	LL
	F	588	F (N)	5881	-

The non-HST series is available only to investors residing in non-HST participating provinces and territories.

*Front End Sales Charge

**Low Load

CONTACT US

Client Services

905.214.8288 or
1.866.818.8877
Fax: 905.214.8100 or
1.866.877.9477

Transfer Agency

EdgePoint Wealth
Management Inc.
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Canada Ltd.
2920 Matheson Blvd East
Mississauga, Ontario L4W 5J4

Head Office

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