

Perspecta Universal Life Insurance

Investment Instructions



Owner Name _____ Policy No. _____

- Current investment modification.** I authorize Standard Life to transfer the current accounts on the above mentioned policy. The dollar value or % is indicated below. Complete **SECTION A**
- Future investment instructions.** I authorize Standard Life to invest my future allocation. Complete **SECTION B**
- Additional deposit.** I authorize Standard Life to invest my additional deposit of \$ _____ as indicated below. Cheque is attached. Complete **SECTION C**

Section A : Current investment instructions

From				To			
Account name / Account number	Dollar value	OR	%	Account name or Account Number	Dollar value	OR	%
Total				Total			

Section B: Future investment instructions

Account name / Account number	%
Total	

Section C : Additional Deposit

Account name / Account number	Dollar value	OR	%
Total		Total	

Please refer to your financial advisor or Standard Life to determine the accounts available.

MANAGED ACCOUNTS

- SL Canadian Bond (MA01)
- SL Corporate High Yield Bond (MA02)
- SL International Bond (MA03)
- SL Monthly Income (MA04)
- SL Balanced (MA05)
- SL Canadian Dividend Growth (MA06)
- SL Canadian Equity (MA07)
- SL Canadian Small Cap (MA08)
- SL US Equity (MA09)
- SL US Mid Cap (MA10)
- SL Global Dividend Growth (MA11)
- SL International Equity (MA12)
- SL Global Equity (MA13)
- SL European Equity (MA014)

PREDETERMINED PORTFOLIO ACCOUNTS

- Conservative Portfolio (PP01)
- Moderate Portfolio (PP02)
- Growth Portfolio (PP03)
- Aggressive Portfolio (PP04)

INDEXED ACCOUNTS

- Money Market Index (IA01)
- Canadian Bond, or II or III (IA02)
- Canadian Equity, or II or III (IA03)
- US Equity or II (IA04)
- Global Equity or II (IA05)
- European Equity or II (IA06)
- EuroAsia Plus Equity or II (IA07)
- Science and Technology Equity (IA08)

STRATEGIC ASSET ALLOCATION ACCOUNTS

- Conservative Asset Allocation (SA01)
- Moderate Asset Allocation (SA02)
- Growth Asset Allocation (SA03)
- Aggressive Asset Allocation (SA04)
- Balanced Asset Allocation (SA05)

TERM INVESTMENT

- 1 year (TI01)
- 3 year (TI02)
- 5 year (TI03)
- 10 year (TI04)
- 15 year (TI05)
- 20 year (TI06)
- Daily interest account (TI07)

Owner's signature : _____ Date : _____

Assignee, if any : _____ Date : _____