

## Fillable application instructions

### Standard Life Mutual Funds

These instructions will help you complete, save and print this fillable application. This application cannot be submitted electronically. Please send a printed and signed copy to Standard Life.

**New business requirements** - For details on our requirements for submitting a Standard Life Mutual Funds application (minimum investment amounts, Fund names and numbers, additional forms, client identification, signatures, etc.), please see pages 1 and 2 in the application.


#### Topics covered in these instructions are:

- [Adobe Reader](#)
- [Functions – Save, Validate, Print, Reset form](#)
- [Completing the application](#)
- [Signatures and initials](#)
- [Language computer settings](#)


#### Adobe Reader

- This fillable application can be completed, saved and printed with the use of Adobe Reader.
- Adobe Reader may be downloaded from Adobe's web site at <http://get.adobe.com/reader>.

#### Functions – Save, Validate, Print, Reset form

<b>Save</b>	<ul style="list-style-type: none"> <li>▪ From the Adobe Reader menu, select <b>File</b> and <b>Save As</b> to save the application form on your computer and information entered on the application.</li> <li>▪ The <b>Save As</b> window will open and you may accept the file name or rename it. Click on the <b>Save</b> button displayed in the window to save the information.</li> <li>▪ The application can be reopened to make changes. Save the application each time you make changes.</li> <li>▪ <b>To close the application</b> Select <b>File</b> and <b>Close</b> or click on the <b>X</b> in the top right-hand corner.</li> </ul>
<p>The following functions are located at the top of page 3 where you start to complete the application. When a function is selected, a short delay may be expected while the process is in progress.</p>	
<b>Validate</b>	<ul style="list-style-type: none"> <li>▪ Click on this function to validate the information you have entered.</li> <li>▪ You will be alerted to any areas where mandatory information is missing. These areas will be outlined with the following motif: </li> <li>▪ The motif vanishes once the area is completed.</li> <li>▪ A general error message (in red text) will also be displayed in each section where information is missing.</li> <li>▪ The error messages will be eliminated once the required information is entered and the application is validated.</li> </ul>

Functions cont'd

<p><b>Print</b></p>	<ul style="list-style-type: none"> <li>▪ Click on this function to print a copy of the application.</li> <li>▪ Prior to the print window being opened, a validation is performed and a message is displayed to indicate errors or missing information.</li> <li>▪ The motif  is displayed on the printed copy in the areas where mandatory information is missing.</li> <li>▪ Missing information may also be entered by hand.</li> </ul>
<p><b>Reset form</b></p>	<ul style="list-style-type: none"> <li>▪ Use this function to remove <b>all</b> information entered on the application.</li> </ul> <p><b>To remove specific information</b></p> <p>Highlight the information to be removed and press the <b>Delete</b> or <b>Backspace</b> key.</p> <p>Do not use the space bar to remove information. Although the space bar will remove information, blank spaces may be inserted and interfere with the validation function causing invalid messages to be displayed.</p>

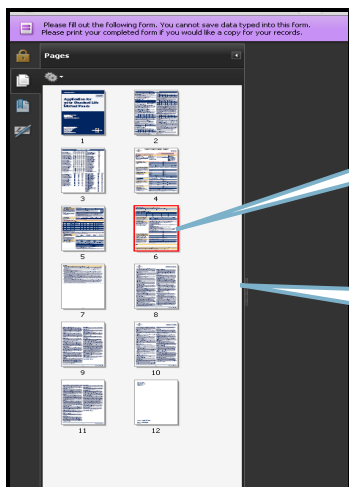
Completing the application

- It is not necessary to complete the full application online. The application may be partially completed online and the balance of the information may be entered by hand.
- Move through the application using the **Tab** key or **mouse**.
- Move from page to page using the **scroll bar** located on the right-hand side of the screen or



click on the thumbnail icon located in the left-hand column to display thumbnail application pages in a navigation pane.

Navigation pane

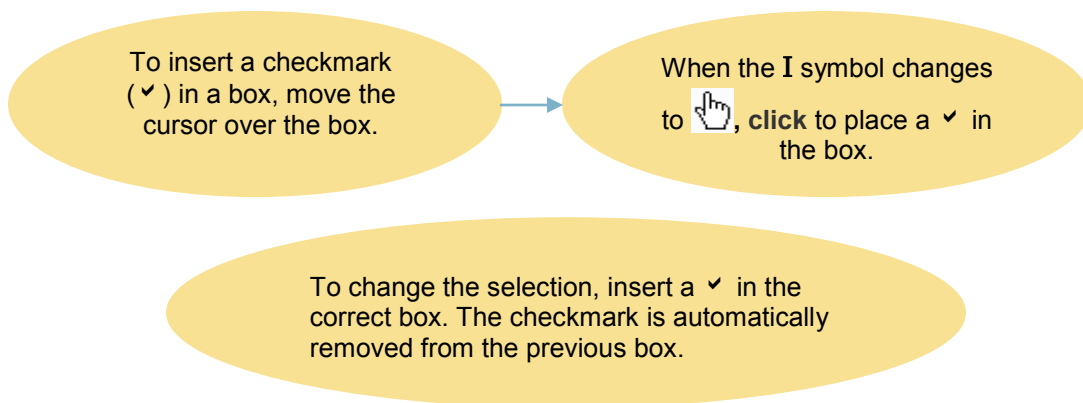


To move to another page in the application, click on the thumbnail page.

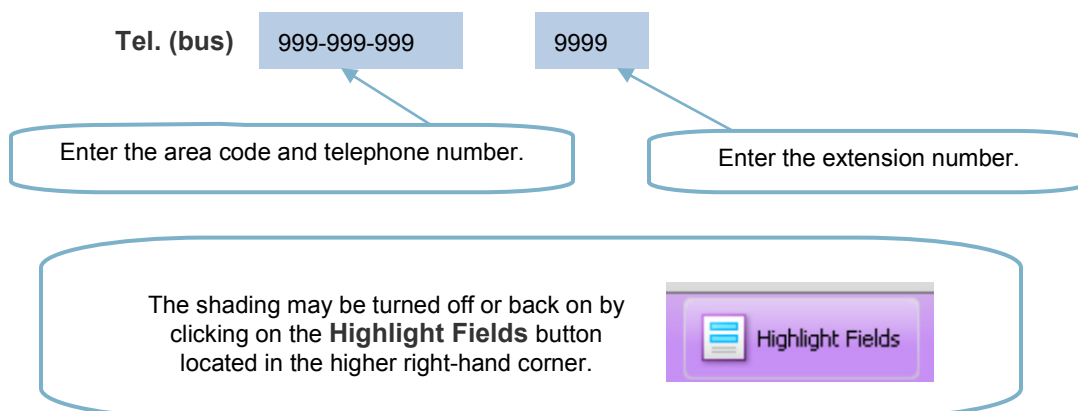
To change the display of the pages to one or more columns, adjust the width of the navigation pane by moving the right edge of the pane to the left or right.

### Completing the application cont'd

- Selecting an option with a checkmark



- Areas where information is entered on the application are shaded. The colour of the shading will depend on your personal computer settings. For a business telephone number, two shaded areas are provided to accommodate the telephone number and extension number.



- Some areas of the application may not be accessible until an option is selected. Examples are:

**Top of application**  
For an additional investment to an existing account, the box for **Additional investment** must be selected prior to entering the account number.

**Section 7 – Investment and Payment Information**  
The box for **Amount (\$)** or **Percent (%)** must be selected prior to entering the dollar amount or percentage in the designated area below.

- The **Notes** area on page 5 is a free form field that can be used to provide additional information.

### Signatures and initials

- Once the application is completed and printed, have the following areas signed or initialled:

Quebec only	
<b>Section 5 – Beneficiary Information</b>	<ul style="list-style-type: none"> <li>To name the spouse as a revocable Beneficiary, the Planholder must initial in the box provided.</li> </ul>
All provinces	
<b>Section 13 – Advisor Certification</b>	<ul style="list-style-type: none"> <li>The Advisor must sign in this section.</li> </ul>
<b>Section 14 – Authorization and Signatures</b>	<ul style="list-style-type: none"> <li>The Planholder, and if applicable, the Joint Planholder must sign in this section.</li> </ul>
<b>Section 15 – Spousal Consent</b>	<ul style="list-style-type: none"> <li>For an LRIF or LIF plan, the Spouse must sign in this section to consent to the transfer of locked-in funds administered in the provinces of Newfoundland and Labrador, Nova Scotia and Ontario.</li> </ul>

### Language - computer settings

- Warning/error messages may be displayed in English and/or French depending on your computer setting and which application is being completed, English or French.
- If you are completing the English application and your computer setting is English, the warning/error messages are displayed in English. The same applies if you are completing the French application and your computer setting is French, the warning/error messages are displayed in French.
- If you are completing the French application and your computer setting is English, part of the warning/error message is in French and part of it is in English. The same applies if you are completing the English application and your computer setting is French.

*Illustration of a warning message when the French application is being completed and computer settings are English.*

