



Individual Wealth Withdrawal Request

Use this form when requesting a one-time withdrawal from your Contract. Refer to the Canada Revenue Agency (CRA) website for the required form if this withdrawal is for the:

- Home Buyer's Plan (HBP)
- Lifelong Learning Plan (LLP)
- First Home Savings Account (FHSA) qualifying withdrawal
- RRSP/FHSA Overcontribution

1. Contract details

Owner name(s)	Contract number
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2. Withdrawal instructions

A. Please choose one:

- Full withdrawal/cancel Contract
- Partial withdrawal - minimum withdrawal amount is \$500 (Equitable GIF minimum withdrawal amount is \$100)
 (please complete section 3 - Partial withdrawal instructions)

B. Deposit money directly to:

- bank account on file (if you have more than one bank account on file, please provide the last four digits of the account number _____) or
- new bank account (please provide a void cheque or direct deposit form)

C. Please indicate the reason for withdrawal: _____

3. Partial withdrawal instructions

A. Amount \$: _____ (If you do not have an active pre-authorized debit (PAD) agreement, the contract must maintain a minimum balance of \$500 and any Equitable GIF contract must maintain a minimum balance of \$100.)

B. For the dollar amount above, please specify (choose one):

- gross amount (before taxes and/or fees) - this is the default if no option is selected
- net amount (after taxes and/or fees)

C. Specify how you would like the proceeds withdrawn (choose one):

- Proportionately from all Funds - this is the default if no instructions provided below
- According to the instructions below:

Fund code or investment name	Amount (must total withdrawal amount specified above)



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4. Terms and conditions

I (we), the contract owner(s), understand that:

- The withdrawal could negatively affect the value of the Contract, including the Maturity Benefit Guarantee and the Death Benefit Guarantee.
- A withdrawal may result in a capital gain or capital loss since it creates a taxable disposition (non-registered contracts only).
- A deferred sales charge and/or market value adjustment as well as a processing fee may be applicable to this transaction.
- Withholding taxes may apply
- Once a withdrawal is processed, it is generally not reversible.

5. Signatures

Your signature confirms that you agree with all the information and instructions set out above:

Date (yyyy/mm/dd)	Contract owner signature(s):
Date (yyyy/mm/dd)	Joint contract owner's signature (if applicable):
Date (yyyy/mm/dd)	Power of attorney signature (if applicable):
Date (yyyy/mm/dd)	Irrevocable beneficiary's signature (if applicable):
Date (yyyy/mm/dd)	Advisor signature (with limited trading authorization):