

Application

March 2008

Updated with Changes for Anti-Money
Laundering Purposes

SunWise[®] Elite
Segregated Funds
Including SunWise[®] Elite Plus



SunWise Elite is an individual variable annuity contract issued by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.



managed by CI Investments Inc.



issued by Sun Life Assurance Company of Canada

Fund Name	Class A (Full Guarantee) 100% maturity/100% death		Class B (Combined Guarantee) 75% maturity/100% death		Class C (Basic Guarantee) 75% maturity/75% death	
	ISC	DSC	ISC	DSC	ISC	DSC
Global Equity Funds						
SWE CI Global Fund	7150	7000	7250	7050	7350	7830
SWE Plus CI Global Fund	7150P	7000P	7250P	7050P	7350P	7830P
SWE CI Global Value Fund	7151	7001	7251	7051	7351	7831
SWE Plus CI Global Value Fund	7151P	7001P	7251P	7051P	7351P	7831P
SWE CI International Value Fund	7152	7002	7252	7052	7352	7832
SWE Plus CI International Value Fund	7152P	7002P	7252P	7052P	7352P	7832P
SWE CI Synergy Global Corporate Fund	7153	7003	7253	7053	7353	7833
SWE Plus CI Synergy Global Corporate Fund	7153P	7003P	7253P	7053P	7353P	7833P
SWE Fidelity NorthStar® Fund	7154	7004	7254	7054	7354	7834
SWE Plus Fidelity NorthStar® Fund	7154P	7004P	7254P	7054P	7354P	7834P
SWE Trimark Select Growth Fund	7155	7005	7255	7055	7355	7835
SWE Plus Trimark Select Growth Fund	7155P	7005P	7255P	7055P	7355P	7835P
SWE Dynamic Global Value Fund	7191	7041	7291	7091	7391	7871
SWE Plus Dynamic Global Value Fund	7191P	7041P	7291P	7091P	7391P	7871P
SWE Mackenzie Cundill Value Fund	7192	7042	7292	7092	7392	7872
SWE Plus Mackenzie Cundill Value Fund	7192P	7042P	7292P	7092P	7392P	7872P
SWE CI Harbour Foreign Equity Corporate Fund	7193	7043	7293	7093	7393	7873
SWE Plus CI Harbour Foreign Equity Corporate Fund	7193P	7043P	7293P	7093P	7393P	7873P
SWE CI Global High Dividend Advantage Fund	7195	7045	7295	7095	7395	7875
SWE Plus CI Global High Dividend Advantage Fund	7195P	7045P	7295P	7095P	7395P	7875P
SWE RBC O'Shaughnessy International Equity Fund	7197	7047	7297	7097	7397	7877
SWE Plus RBC O'Shaughnessy International Equity Fund	7197P	7047P	7297P	7097P	7397P	7877P
SWE Manulife Global Opportunities Fund	7704	7754	7604	7654	7504	7554
SWE Plus Manulife Global Opportunities Fund	7704P	7754P	7604P	7654P	7504P	7554P
SWE CI Cambridge Global Equity Corporate Fund	7709	7759	7609	7659	7509	7559
SWE Plus CI Cambridge Global Equity Corporate Fund	7709P	7759P	7609P	7659P	7509P	7559P
Global Balanced & Asset Allocation Funds						
SWE CI International Balanced Fund	7157	7007	7257	7057	7357	7837
SWE Plus CI International Balanced Fund	7157P	7007P	7257P	7057P	7357P	7837P
SWE Fidelity Global Asset Allocation Fund	7158	7008	7258	7058	7358	7838
SWE Plus Fidelity Global Asset Allocation Fund	7158P	7008P	7258P	7058P	7358P	7838P
SWE Trimark Global Balanced Fund	7159	7009	7259	7059	7359	7839
SWE Plus Trimark Global Balanced Fund	7159P	7009P	7259P	7059P	7359P	7839P
SWE CI Harbour Foreign Growth & Income Corporate Fund	7194	7044	7294	7094	7394	7874
SWE Plus CI Harbour Foreign Growth & Income Corporate Fund	7194P	7044P	7294P	7094P	7394P	7874P
SWE CI Signature Global Income & Growth Fund	7701	7751	7601	7651	7501	7551
SWE Plus CI Signature Global Income & Growth Fund	7701P	7751P	7601P	7651P	7501P	7551P
SWE Northwest Growth & Income Fund	7702	7752	7602	7652	7502	7552
SWE Plus Northwest Growth & Income Fund	7702P	7752P	7602P	7652P	7502P	7552P
SWE Manulife Global Monthly Income Fund	7703	7753	7603	7653	7503	7553
SWE Plus Manulife Global Monthly Income Fund	7703P	7753P	7603P	7653P	7503P	7553P
U.S. Equity Funds						
SWE Dynamic Power American Growth Fund	7160	7010	7260	7060	7360	7840
SWE Plus Dynamic Power American Growth Fund	7160P	7010P	7260P	7060P	7360P	7840P
SWE CI American Value Fund	7161	7011	7261	7061	7361	7841
SWE Plus CI American Value Fund	7161P	7011P	7261P	7061P	7361P	7841P
SWE CI Synergy American Fund	7162	7012	7262	7062	7362	7842
SWE Plus CI Synergy American Fund	7162P	7012P	7262P	7062P	7362P	7842P
SWE CI Value Trust Corporate Fund	7163	7013	7263	7063	7363	7843
SWE Plus CI Value Trust Corporate Fund	7163P	7013P	7263P	7063P	7363P	7843P
SWE Fidelity Growth America Fund	7164	7014	7264	7064	7364	7844
SWE Plus Fidelity Growth America Fund	7164P	7014P	7264P	7064P	7364P	7844P
Canadian Equity Funds						
SWE AIM Canadian First Class Fund	7165	7015	7265	7065	7365	7845
SWE Plus AIM Canadian First Class Fund	7165P	7015P	7265P	7065P	7365P	7845P
SWE CI Canadian Investment Fund	7166	7016	7266	7066	7366	7846
SWE Plus CI Canadian Investment Fund	7166P	7016P	7266P	7066P	7366P	7846P



Fund Name	Class A (Full Guarantee) 100% maturity/100% death		Class B (Combined Guarantee) 75% maturity/100% death		Class C (Basic Guarantee) 75% maturity/75% death	
	ISC	DSC	ISC	DSC	ISC	DSC
Canadian Equity Funds <i>continued</i>						
SWE CI Harbour Fund	7167	7017	7267	7067	7367	7847
SWE Plus CI Harbour Fund	7167P	7017P	7267P	7067P	7367P	7847P
SWE CI Signature Select Canadian Fund	7168	7018	7268	7068	7368	7848
SWE Plus CI Signature Select Canadian Fund	7168P	7018P	7268P	7068P	7368P	7848P
SWE CI Synergy Canadian Fund	7169	7019	7269	7069	7369	7849
SWE Plus CI Synergy Canadian Fund	7169P	7019P	7269P	7069P	7369P	7849P
SWE Fidelity True North® Fund	7170	7020	7270	7070	7370	7850
SWE Plus Fidelity True North® Fund	7170P	7020P	7270P	7070P	7370P	7850P
SWE Mackenzie Cundill Canadian Security Fund	7171	7021	7271	7071	7371	7851
SWE Plus Mackenzie Cundill Canadian Security Fund	7171P	7021P	7271P	7071P	7371P	7851P
SWE RBC Canadian Dividend Fund	7198	7048	7298	7098	7398	7878
SWE Plus RBC Canadian Dividend Fund	7198P	7048P	7298P	7098P	7398P	7878P
SWE CI Cambridge Canadian Equity Corporate Fund	7708	7758	7608	7658	7508	7558
SWE Plus CI Cambridge Canadian Equity Corporate Fund	7708P	7758P	7608P	7658P	7508P	7558P
Canadian Balanced Funds						
SWE CI Signature Canadian Asset Allocation Fund	7172	7022	7272	7072	7372	7852
SWE Plus CI Signature Canadian Asset Allocation Fund	7172P	7022P	7272P	7072P	7372P	7852P
SWE CI Harbour Growth & Income Fund	7173	7023	7273	7073	7373	7853
SWE Plus CI Harbour Growth & Income Fund	7173P	7023P	7273P	7073P	7373P	7853P
SWE Fidelity Canadian Asset Allocation Fund	7174	7024	7274	7074	7374	7854
SWE Plus Fidelity Canadian Asset Allocation Fund	7174P	7024P	7274P	7074P	7374P	7854P
SWE Mackenzie Cundill Canadian Balanced Fund	7175	7025	7275	7075	7375	7855
SWE Plus Mackenzie Cundill Canadian Balanced Fund	7175P	7025P	7275P	7075P	7375P	7855P
SWE CI Signature Income & Growth Fund	7176	7026	7276	7076	7376	7856
SWE Plus CI Signature Income & Growth Fund	7176P	7026P	7276P	7076P	7376P	7856P
SWE Trimark Income Growth Fund	7177	7027	7277	7077	7377	7857
SWE Plus Trimark Income Growth Fund	7177P	7027P	7277P	7077P	7377P	7857P
SWE CI Cambridge Canadian Asset Allocation Corporate Fund	7707	7757	7607	7657	7507	7557
SWE Plus CI Cambridge Canadian Asset Allocation Corporate Fund	7707P	7757P	7607P	7657P	7507P	7557P
Portfolio Series						
SWE Portfolio Series Balanced Fund	7178	7028	7278	7078	7378	7858
SWE Plus Portfolio Series Balanced Fund	7178P	7028P	7278P	7078P	7378P	7858P
SWE Portfolio Series Conservative Fund	7179	7029	7279	7079	7379	7859
SWE Plus Portfolio Series Conservative Fund	7179P	7029P	7279P	7079P	7379P	7859P
SWE Portfolio Series Income Fund	7180	7030	7280	7080	7380	7860
SWE Plus Portfolio Series Income Fund	7180P	7030P	7280P	7080P	7380P	7860P
SWE Portfolio Series Balanced Growth Fund	7181	7031	7281	7081	7381	7861
SWE Plus Portfolio Series Balanced Growth Fund	7181P	7031P	7281P	7081P	7381P	7861P
SWE Portfolio Series Conservative Balanced Fund	7182	7032	7282	7082	7382	7862
SWE Plus Portfolio Series Conservative Balanced Fund	7182P	7032P	7282P	7082P	7382P	7862P
SWE Portfolio Series Growth Fund	7183	7033	7283	7083	7383	7863
SWE Plus Portfolio Series Growth Fund	7183P	7033P	7283P	7083P	7383P	7863P
SWE Portfolio Series Maximum Growth Fund	7184	7034	7284	7084	7384	7864
SWE Plus Portfolio Series Maximum Growth Fund	7184P	7034P	7284P	7084P	7384P	7864P
Income Funds						
SWE CI Signature Canadian Bond Fund	7185	7035	7285	7085	7385	7865
SWE Plus CI Signature Canadian Bond Fund	7185P	7035P	7285P	7085P	7385P	7865P
SWE CI Global Bond Fund	7186	7036	7286	7086	7386	7866
SWE Plus CI Global Bond Fund	7186P	7036P	7286P	7086P	7386P	7866P
SWE CI Signature Dividend Fund	7188	7038	7288	7088	7388	7868
SWE Plus CI Signature Dividend Fund	7188P	7038P	7288P	7088P	7388P	7868P
SWE CI Signature High Income Fund	7189	7039	7289	7089	7389	7869
SWE Plus CI Signature High Income Fund	7189P	7039P	7289P	7089P	7389P	7869P
SWE TD Canadian Bond Fund	7196	7046	7296	7096	7396	7876
SWE Plus TD Canadian Bond Fund	7196P	7046P	7296P	7096P	7396P	7876P
Money Market Funds						
SWE CI Money Market Fund	7190	7040	7290	7090	7390	7870
SWE Plus CI Money Market Fund	7190P	7040P	7290P	7090P	7390P	7870P

1 Contract Type

(Please choose only one)

SUNWISE ELITE CONTRACT NUMBER _____

Language Preference: English French (If no language preference is indicated, English will be selected.)

- Non-Registered Plan (Open) Retirement Savings Plan (RSP) Spousal RSP Retirement Income Fund (RIF) Spousal RIF
 Life Income Fund (LIF)* Locked-in Retirement Account (LIRA) or Locked-in RSP* Locked-in Retirement Income Fund (LRIF)*
 Group RSP Prescribed Retirement Income Fund (PRIF)* Corporate** Partnership** Estate** Trust** Sole Proprietorship

*Subject to the terms of the applicable endorsement

** CI AML_04/08 form required with your application in lieu of Section 13.

2a Owner Information

Title: Mr. Mrs. Miss Ms. Dr.

Gender: Male Female

Owner's Last Name _____ First Name _____ Middle Initial _____
(The Owner is also the Annuitant unless otherwise stated in Section 2c)

_____ M A N D A T O R Y
Social Insurance Number

_____ Y M A N D A T O R Y
Birth Date

Owner's Address _____ City _____ Province _____ Postal Code _____

Residence Telephone _____ Owner's E-mail Address _____

_____ M A N D A T O R Y
Country of Residency

2b Joint, In Trust For or Spousal Registered Plan Information

Ownership Type: Joint Owners with Right of Survivorship* (not applicable in Quebec) **OR** Joint Owners* **OR** In Trust* **OR** Spousal Registered Plan

Title: Mr. Mrs. Miss Ms. Dr.

Gender: Male Female

*Not applicable to Registered Contracts

Last Name _____ First Name _____ Middle Initial _____

_____ M A N D A T O R Y
Social Insurance Number

_____ Y M A N D A T O R Y
Birth Date

Signing Authority: Both signatures required Only one signature required (Please make selection for Joint Registration)

2c Annuitant Information

(Complete if different from Owner)

(For Registered Contracts, the Annuitant must be the Owner.)

For Non-Registered Joint Ownership Contracts, if no single Annuitant is named below, the Contract will be deemed to have Joint Annuitants and the Contract Maturity Date will be determined based on the age of the younger Annuitant.

Title: Mr. Mrs. Miss Ms. Dr. Gender: Male Female

Annuitant's Last Name _____ First Name _____ Middle Initial _____

Country of Residency _____

MANDATORY IF ANNUITANT DIFFERENT FROM OWNER

Annuitant's Address _____

X

Annuitant's Signature (Only required if Annuitant is not the Owner)

Relationship to Owner _____

2d Successor Owner

(Optional)

(For Non-Registered Contracts only)

Title: Mr. Mrs. Miss Ms. Dr.

Gender: Male Female

Successor Owner's Last Name _____

First Name _____

Middle Initial _____

_____ Y M A N D A T O R Y
Birth Date

Address _____

Relationship to Owner _____

3 Optional Riders

By selecting any of these riders you acknowledge having read the applicable sections of the information folder and contract and agree to the applicable fees.

SunWise Elite Plus: Guaranteed Minimum Withdrawal Benefit (GMWB). The GMWB rider may be elected only prior to the annuitant's 80th birthday, or prior to the age limits defined in the contract. Investment selection and minimum premium deposit restrictions apply, please see your contract.

Payment Option (please select one)

- GWB Lifetime Option** – May be selected prior to Annuitant's 65th birthday but the LWA is only calculated on December 31 of the year in which the Annuitant (the LWA Annuitant for Joint Annuitants Contracts) turns 65. Guaranteed income under the GWB Lifetime Option ends upon the death of the LWA Annuitant. If a redemption is placed on or before December 31 of the year in which the Annuitant/LWA Annuitant turns 65, the payment option will be changed to the GWB Withdrawal Period Option.
 GWB Withdrawal Period Option – Guaranteed income under the rider ends: when the Remaining GWB is reduced to nil; when the contract is terminated; on the contract maturity date or upon the death of the last surviving annuitant.

LWA Annuitant* (to be completed for SunWise Elite Plus Joint Annuitant Contracts only)

LWA Annuitant's Last Name _____

First Name _____

Middle Initial _____

_____ Y M A N D A T O R Y
Birth Date

*The LWA Annuitant is the person whose life the LWA payment entitlement is based upon and must be one of the above named Joint Annuitants.

- 4% Annual Automatic Death Benefit Reset** (Class A and Class B Units only). If this rider is elected, you will be replacing client selected resets on maturity and death benefit guarantees with the 4% annual automatic death benefit reset. This rider may only be elected at the time of this application.
 Earnings Enhancement Benefit. The Optional Earnings Enhancement Benefit (EEB) is offered as an enhancement to the Death Benefit described in the Contract. The EEB is available only for deposits made prior to the Annuitant's 75th birthday. If the EEB is elected, it will be applicable to all Class options under the Contract. This rider may only be elected at the time of this application.

4 Choose Your SunWise Elite Investment(s)

GUARANTEE OPTIONS: CLASS A - 100% Maturity/100% Death Guarantees CLASS B - 75% Maturity/100% Death Guarantees CLASS C - 75% Maturity/75% Death Guarantees

Initial deposit of \$ _____ is to be allocated as follows **OR** RSP/LIRA/RIF/LIF/LRIF/PRIF transfer (T2033/T2151/TD2 attached) to be allocated as follows:

Transfer existing Contract _____ (Contract Number) to New SunWise Elite Contract Transfer existing RSP/LIRA _____ (Contract Number) to a RIF/LIF/LRIF

FUND NAME	FUND CODE***	CLASS OPTION A, B or C	"DSC" ✓	OR	SALES CHARGE	GROSS AMOUNT***	PERCENT	PAC AMOUNT*	TARGET ASSET ALLOCATION**
					%	\$	%		%
					%	\$	%		%
					%	\$	%		%
					%	\$	%		%
					%	\$	%		%

If no commission method is indicated, the deferred sales charge method will be applied to all Funds, except for SunWise Elite CI Money Market Fund where the initial sales charge method will be applied.

*Minimum of \$50 per Fund - Please complete Sections 6 and 8

**Must total 100% for each class of funds. Please complete Section 16.

***For SunWise Elite Plus (GMWB) you must allocate the minimum required (\$25,000) to SunWise Elite Plus (GMWB) fund codes as shown on the attached list.

5 Beneficiary Designation

The Owner understands that the beneficiary designation is revocable, unless the owner designates the beneficiary as irrevocable below. The following person(s) is (are) appointed as the beneficiary(ies) of the Contract in the event of the death of the Annuitant, if living at the date of that death. For Contracts signed in Quebec the relationship of the beneficiary must be to the Contract Owner and the designation of a spouse (married or civil union) as beneficiary is irrevocable unless the Owner checks this box: revocable. If LIRA, LIF, LRIF or PRIF the beneficiary designation may not be effective if you have a spouse as provincial pension legislation may take precedence over the beneficiary designation.

	Share (%)	Irrevocable Beneficiary	
Beneficiary's Name _____ Relationship to Annuitant _____	_____ %	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Irrevocable Beneficiary's Signature _____
Contingent Beneficiary's Name for above share* _____ Relationship to Annuitant _____			
Beneficiary's Name _____ Relationship to Annuitant _____	_____ %	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Irrevocable Beneficiary's Signature _____
Contingent Beneficiary's Name for above share* _____ Relationship to Annuitant _____			
Beneficiary's Name _____ Relationship to Annuitant _____	_____ %	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Irrevocable Beneficiary's Signature _____
Contingent Beneficiary's Name for above share* _____ Relationship to Annuitant _____			
EEB Beneficiary (if different than above) _____ Relationship to Annuitant _____	_____ %		

* If the beneficiary predeceases the Annuitant, the contingent beneficiary, if still alive at the death of the Annuitant, shall receive that share of the death benefit.

6 Pre-Authorized Chequing Plan (PAC) (Please complete Section 4 and 8)

I (We) hereby authorize _____ (Bank Name) to debit my (our) account for all amounts payable to: **CI Investments Inc.**

Starting on (specify the month and day) _____ (MM/DD) direct amounts into the Fund(s) as indicated in Section 4.

Frequency (please choose only one) Weekly Bi-weekly Monthly Bi-monthly Quarterly Semi-Annually Annually

I (We) choose to receive plan payment confirmations. (All Owners receive annual statements detailing transactions in their Contract.)

Treatment of each payment shall be the same as if I (we) had personally issued a cheque authorizing you to pay as indicated and to debit the amount specified to my (our) account. This authorization shall remain in effect until cancellation by written notice to CI Investments Inc. A cancellation notice will be provided at least 48 hours prior to PAC plan debit date.

Signature(s) required if Depositor(s) is (are) other than the Owner(s) indicated in Section 2a. _____ Date _____

For a joint bank account, all Depositors must sign if more than one signature is required on cheques issued against the account.

7 Automatic Withdrawal Plan (AWD) & RRIF/LIF/LRIF/PRIF Plan Payment Details

7a. RRIF/LIF/LRIF/PRIF PAYMENTS (The payment date may be between the 1st and the 25th of any month)

Please accept this authorization to surrender sufficient units to provide the following payment (please choose only one)

The minimum annual payment (MAP) requirements

The maximum annual gross amount (for LIF/LRIF Plans only)*

The annual GWA/LWA (For SunWise Elite Plus contract holders only)

An annual amount of \$ _____ Gross or Net of fees and withholding taxes*

If no date or payment amount is indicated, CI will pay the RRIF/LIF/LRIF/PRIF minimum during the month of December, and will redeem units proportionately across all Funds. For scheduled payments that are below the MAP requirement, CI will pay the balance of the RRIF/LIF/LRIF/PRIF MAP during the month of December and will redeem units proportionately across the Funds indicated in section 7c. If no Fund selection is indicated below, the MAP balance will be redeemed proportionally across all Funds held in the contract.

I elect the term of RRIF payments to be based on My age Age of my spouse if younger (Please provide spouse's date of birth Y | M | D.)

*Withdrawals in excess of the annual GWA/LWA may have a negative impact on future guaranteed payments under the Guaranteed Minimum Withdrawal Benefit.

7b. NON-REGISTERED AWD PLANS

Please accept this authorization to surrender sufficient units to provide the following payment (please choose only one)

- An annual amount of \$ _____ Gross or Net of fees* The annual GWA/LWA (For SunWise Elite Plus contract holders only)

*Withdrawals in excess of the annual GWA/LWA may have a negative impact on future guaranteed payments under the Guaranteed Minimum Withdrawal Benefit.

7c. PAYMENT INSTRUCTIONS

For all regularly scheduled payments

Frequency (please choose only one): Monthly Quarterly Semi-Annually Annually Start date: Y | M | D

Deposit directly to bank account, please complete Section 8 (Bank clearing time for the deposit may vary depending on your financial institution)

Mail to Owner Mail to alternate address

Name _____

Address _____ City/Province _____ Postal Code _____

FUND NAME	FUND CODE	SURRENDER AMOUNT	OR	PERCENT
		\$		%
		\$		%
		\$		%
		\$		%

8 Banking Information (Please complete for Sections 6 and/or 7 and attach a void cheque.)

Bank Account Owner(s) Name(s) _____

Bank Name _____

Bank Transit Number _____

Bank Account Number _____

9 LIF/LRIF/PRIF Information

SPOUSE: Do you have a spouse within the meaning of the applicable pension legislation? Yes No

Note: If you have a spouse within the meaning of the applicable pension legislation, then the form noted at the end of this Application must be fully completed and accompany the Application.

10 Sun Life Financial Privacy Statement for Canada

At Sun Life Financial, protecting your privacy is a priority. We maintain a confidential file in our offices containing personal information about you and your contract(s) with us. Our files are kept for the purpose of providing you with investment and insurance products or services that will help you meet your lifetime financial objectives. Access to your personal information is restricted to those employees, representatives and third party service providers who are responsible for the administration, processing and servicing of your contract(s) with us, or any other person whom you authorize. In some instances these persons may be located outside Canada, and your personal information may be subject to the laws of those foreign jurisdictions. You are entitled to consult the information contained in our file and, if applicable, to have it corrected by sending a written request to us.

To find out about our Privacy Policy, visit our website at www.sunlife.ca or call 1 877 SUN LIFE/1-877-786-5433 and request that a copy of our Privacy Brochure be sent to you.

11 CI Investments Privacy Statements for Canada

Upon receipt of this application, CI will establish a file in which will be placed personal information about you concerning this application, endorsement, rider or other documents issued in connection with this application, and other documents or information relating to the investigation, servicing and administration of this application. We collect personal information about you from this application and any supplementary forms, and from your representative and other organizations and persons you identify in support of your application. We use your personal information for the purposes of, servicing and administering this application, and for such other purposes as are specified in this application. Your information may be shared with your representative of record for the purposes identified above. Your Social Insurance Number will be used for income reporting purposes in the context of the administration of your account. Your banking information will be disclosed to the financial institution(s) processing your pre-authorized deposit plan.

Employees or authorized representatives of CI or its affiliates, who will be responsible for functions relevant to the purposes identified above, and other persons authorized by you or by law, will have access to the personal information contained in your file. Note that your financial advisor or broker is not an employee of CI. Subject to exceptions set out in applicable legislation, you may access your file and request corrections to your personal information by sending a written request to CI Investments Inc, Attn: Privacy Officer, 151 Yonge Street, Eighth Floor, Toronto, Ontario M5C 2W7. **By completing and signing this application, you consent to the collection, use and disclosure of your personal information as described herein. CI's Privacy Policy is available on the CI Website, www.ci.com**

If a spousal RSP is indicated in this application, then you represent and warrant that your spouse has consented to the provision of his/her personal information in this application and to the collection, use and disclosure of his/her personal information as described herein.

12 Acknowledgement/Authorization (All Owners must read and sign this Section.)

I (We), the Owner(s), declare that all statements and answers made by me (us) on this Application are fully complete and true.

I (We) hereby acknowledge having read the provisions contained in the "Sun Life Privacy Statements for Canada" and "CI Investments Privacy Statements for Canada", contained in this Application, and I (we) hereby agree to them.

I (We) have requested that this Application Form be drafted in the English language only. J'ai (nous avons) demandé que le présent formulaire de demande soit rédigé uniquement en anglais.

I (We), the Owner(s), acknowledge receipt of the Individual Variable Annuity Contract and Information Folder and the financial highlights of the Funds prior to signing the Application.

Will this Contract replace or cause a change in, or involve a loan under, any insurance or annuity policy on the Annuitant's life or owned by the Owner?

Yes, state company and plan: _____ No

If LIRA, Locked-In RSP, LIF, LRIF or PRIF the amount being transferred to the Contract was determined on the basis of the Owner's gender. Yes No

Request for Registration (Must be completed for RSP, LIRA, Locked-In RSP, RIF, LIF, LRIF and PRIF Contracts)

Yes, Sun Life Assurance Company of Canada is requested to register the above policy as a **Retirement Savings Plan** under the Income Tax Act (Canada) and under any applicable provincial legislation.

Yes, Sun Life Assurance Company of Canada is requested to register the above policy as a **Retirement Income Fund** under the Income Tax Act (Canada) and under any applicable provincial legislation.

Owner's Signature

Y | M | D
Date

Signed at (City, Province)

Joint Owner's Signature

Y | M | D
Date

Signature of Witness

13 Identity Verification, Third Party Determination and Politically Exposed Foreign Persons**MANDATORY for Non Registered Contract**

For Corporate, Partnership, Estate and Trust Contracts the CI Anti-Money Laundering Identity Verification Supplement (CI AML_04/08) form is required with the application in lieu of this section.

To comply with the Proceeds of Crime (Money Laundering) and Terrorist Financing Act and for risk management purposes, the identity of clients must be verified and the existence and involvement of any third parties determined. **As a result, this section must be completed.**

Refer to an original Canadian passport, birth certificate, driver's licence or document issued by a Canadian federal, provincial or territorial government of the contract owner(s).

Owner: Type of document _____ Document Number _____ Country/Province of issue _____ Occupation _____

Joint Owner: Type of document _____ Document Number _____ Country/Province of issue _____ Occupation _____

Provide the source of payment for this application/contract (select all that apply).

- salary or earned income borrowed funds proceeds from death benefits or estate applicant/owner's savings pension income inherited funds
 business income gifted funds social benefits existing investment account sale of property other (_____)

Is a third party involved with this contract, or will a third party pay for this contract, or have the use of, or access to, the contract value?

Yes No If yes, attach completed CI Anti-money Laundering Identity Verification Supplement form (CI AML_04/08)

Types of a third party include, but are not limited, to: Payor, Executor, Attorney (Power of Attorney) or Mandatary, Assignee or Trustee

To the best of the applicant's/owner's knowledge, has the applicant/owner or any close relative (living or deceased) been considered a Politically Exposed Foreign Person (PEFP)?

Yes No If yes, attach completed CI Anti-money Laundering Identity Verification Supplement form (CI AML_04/08)

For clarification and a definition of a PEFP please see the reverse side of this page.

14a Distributor Information

Distributor's Name _____ Representative's Name _____

Distributor's Number _____ Representative's Number _____ E-mail Address _____

Training Supervisor's Signature (Quebec only) _____

14b Advisor Attestation

In regard to the purchase of a non-registered product, I, the advisor, confirm that all of the identification details provided in this form match the original identification documents shown to me. I also confirm that I have reviewed the details provided in this form with the applicant/owner and to the best of my knowledge, unless otherwise noted, these details are full, complete and true.

Representative's signature re: 14(a) and 14(b) _____ **MANDATORY**

Complete if Representative verifying identity is different from Servicing Representative

Representative Name _____ Distributor / Representative Number _____ Date _____

15 Systematic Transfer Plan

Please accept this authorization to transfer units from one Fund to another in the same Class, starting on (specify the month and day) _____ (MM/DD) as follows:

Frequency (please choose only one): Monthly Quarterly Semi-Annually Annually

AMOUNT	FROM FUND	FUND CODE	TO FUND	FUND CODE	"DSC" <input checked="" type="checkbox"/> Or SALES CHARGE (Maximum 2%)
\$					%
\$					%

16 Automatic Portfolio Rebalancing Service (Optional)*

**To activate this service, a target asset allocation must be completed in Section 4 for each fund that is to be included in the portfolio rebalancing service.*

CI Investments offers an automatic portfolio rebalancing service to all investors. On the first Friday of every month we will review your Contract to determine if you are scheduled for a rebalance based upon your instructions. If one or more of your fund holdings varies from your target allocation by more than your selected variance, we will automatically switch your investments back to your requested target allocation. There is no fee for this service. Please review your target allocation regularly to ensure it remains current.

Select your variance:

- 2.5% 3.0% 3.5% 4.0% 4.5% 5.0%
 5.5% 6.0% 6.5% 7.0% 7.5% 8.0%
 8.5% 9.0% 9.5% 10.0%

*Defaults to 2.5%, if no selection is made.

Select your frequency:

- Monthly Quarterly (March, June, September & December)
 Semi-Annually (June & December)
 Annually, please indicate which month: _____

*Defaults to Quarterly, if no selection is made.

Client Authorization: I (We) hereby authorize CI Investments Inc. to automatically rebalance my (our) SunWise Elite Contract based on the variance and frequency stated above by switching investments to return to my (our) target fund allocation if one or more fund holding(s) vary by more than the selected variance. I (We) understand there may be tax implications for these transactions for non-registered Contracts. Provided a target fund has a fund balance greater than zero, the Automatic Portfolio Rebalancing Service will continue unless CI receives instructions to discontinue. If 100% of one or more target funds within the target allocation are redeemed or switched/transferred from the target fund mix, the target fund allocation will be updated and proportionately allocated to the remaining active funds in the target fund allocation.

17 Group Retirement Savings Plan (GRSP)**(Not applicable for LIRA/RIF/LIF/LRIF/PRIF)**

Group Company Name _____ Employee's Signature _____

I certify that I am an employee of the company or association named in this section and hereby authorize such employer or association to deduct from my earnings and remit contributions to the CI Investments Group Plan (as indicated in Section 4) and to assist in the administration of the Plan as my agent and, where applicable, as agent of my spouse or common-law partner and to include such contribution in computing the amount of withholding tax required under applicable tax legislation.

SUBJECT TO ANY APPLICABLE DEATH AND MATURITY GUARANTEES, ANY AMOUNT THAT IS ALLOCATED TO A SEGREGATED FUND IS INVESTED AT THE RISK OF THE CONTRACT HOLDER AND MAY INCREASE OR DECREASE IN VALUE.

What is a politically exposed foreign person?

A politically exposed foreign person (PEFP) is a person who has ever held any of the following positions or offices in or on behalf of a country other than Canada.

- member of the executive council of government
- president of a state-owned company or a state-owned bank
- deputy minister or equivalent rank
- ambassador or attaché or counselor of an ambassador
- leader or president of a political party represented in a legislature
- head of state or head of government
- head of a government agency
- judge
- military officer with a rank of general or above
- member of legislature

Note: Close relative means spouse, civil union spouse or common-law partner, children/step children, siblings/half siblings/step siblings of the applicant, biological/adoptive/step parent of the applicant, biological/adoptive/step parent of spouse, civil union spouse or common-law partner.

Spousal Consent/Waiver Forms

(Complete if you indicated yes in Section 9)

If the Plan being applied for is a LIF or a LRIF or a PRIF, and the Owner has a spouse as defined by applicable pension legislation, then the appropriate form below must be completed. No form is necessary for P.E.I, Quebec and New Brunswick or for federally governed plans.

<u>Province that governs the plan</u>	<u>Name of form</u>	<u>Form type</u>
British Columbia	Spouse's Consent	Form 3 (original)
Alberta	Spouse's Waiver	Form 6 Part 1 Option 2
Saskatchewan	Spouse's Waiver	Form 1 (copy)
Manitoba	Spouse's Waiver	Form MG-1701 (copy)
Ontario	Spouse's Consent	Spousal Consent (original)
Nova Scotia	Spouse's Waiver	Form 4 (original)
Newfoundland	Spouse's Waiver	Form 3 (original)

Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies, is the sole issuer of the individual variable annuity contract providing for investment in SunWise Elite segregated funds. A description of the key features of the applicable individual variable annuity contract is contained in the Information Folder. **SUBJECT TO ANY APPLICABLE DEATH AND MATURITY GUARANTEES, ANY AMOUNT THAT IS ALLOCATED TO A SEGREGATED FUND IS INVESTED AT THE RISK OF THE CONTRACT HOLDER AND MAY INCREASE OR DECREASE IN VALUE ACCORDING TO FLUCTUATIONS IN THE MARKET VALUE.** [®]CI Investments and the CI Investments design are registered trademarks of CI Investments Inc. [®]SunWise is a registered trademark of Sun Life Assurance Company of Canada. [®]AIM, the chevron logo and all associated trademarks are trademarks of AIM Management Group Inc., used under licence. [®]TRIMARK and all associated trademarks are trademarks of AIM Funds Management Inc. [®]Fidelity Investments and the Fidelity design are registered trademarks of FMR Corp. [®]RBC Asset Management is a registered trademark of Royal Bank of Canada. [™]TD Asset Management is a trademark of The Toronto-Dominion Bank, used under licence.



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French: 1-800-668-3528

Fund Codes SunWise Elite Quotential Portfolios

Fund Name	Class A (Full Guarantee) 100% maturity/100% death				Class B (Combined Guarantee) 75% maturity/100% death				Class C (Basic Guarantee) 75% maturity/75% death			
	SunWise Elite		SunWise Elite Plus (GMWB)		SunWise Elite		SunWise Elite Plus (GMWB)		SunWise Elite		SunWise Elite Plus (GMWB)	
	ISC	DSC	ISC	DSC	ISC	DSC	ISC	DSC	ISC	DSC	ISC	DSC
SunWise Elite Quotential Portfolios												
SWE Franklin Templeton Quotential Diversified Income Portfolio	9409	9909	9409P	9909P	9429	9929	9429P	9929P	9449	9949	9449P	9949P
SWE Franklin Templeton Quotential Balanced Income Portfolio	9410	9910	9410P	9910P	9430	9930	9430P	9930P	9450	9950	9450P	9950P
SWE Franklin Templeton Quotential Balanced Growth Portfolio	9411	9911	9411P	9911P	9431	9931	9431P	9931P	9451	9951	9451P	9951P
SWE Franklin Templeton Quotential Global Balanced Portfolio	9412	9912	9412P	9912P	9432	9932	9432P	9932P	9452	9952	9452P	9952P
SWE Franklin Templeton Quotential Growth Portfolio	9413	9913	9413P	9913P	9433	9933	9433P	9933P	9453	9953	9453P	9953P
SWE Franklin Templeton Quotential Canadian Growth Portfolio	9414	9914	9414P	9914P	9434	9934	9434P	9934P	9454	9954	9454P	9954P
SWE Franklin Templeton Quotential Global Growth Portfolio	9415	9915	9415P	9915P	9435	9935	9435P	9935P	9455	9955	9455P	9955P
SWE Franklin Templeton Quotential Maximum Growth Portfolio	9416	9916	9416P	9916P	9436	9936	9436P	9936P	9456	9956	9456P	9956P



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