

My Investment Option Change Form

You may process this transaction online for free using PLANet, or continue by submitting this paper version (fees may apply). PEPP recommends that you complete the *My PEPP Investor Profile*, a questionnaire designed to assist you in making investment choices, and review the *PEPP Talk on Changing Your Investment Options*. You can access both of these, and additional information on the investment options available to you on our website at www.peba.gov.sk.ca.

<div style="text-align: center; border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">1</div> <p style="text-align: center; font-weight: bold;">Tell us about you</p>	Member Number:	Mailing Address:
	Last Name:	City:
	First Name & Initial:	Province:
	Birthday (dd/mm/year):	Postal Code:
	Home Phone:	Email Address:
	Work Phone:	Mobile Phone:

As a member of PEPP you may invest in up to three funds as one time. Choose from six asset allocation funds (PEPP Steps, Conservative, Moderate, Balanced, Growth or Accelerated Growth) and two speciality funds (Bond or Money Market). You may invest in one allocation fund at a time, and add one or both of the speciality funds or invest solely in speciality funds.

<div style="text-align: center; border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">2</div> <p style="text-align: center; font-weight: bold;">Tell us how you want your account balance invested.</p>	<p>We will transfer your account to reflect the following instructions:</p> <p>New Fund Selection</p> <p>! You may select ONE from this group:</p> <table border="1"> <thead> <tr> <th></th> <th style="text-align: center;">Invest my account balance</th> </tr> </thead> <tbody> <tr><td>PEPP Steps</td><td style="text-align: center;">%</td></tr> <tr><td>Accelerated Growth</td><td style="text-align: center;">%</td></tr> <tr><td>Growth</td><td style="text-align: center;">%</td></tr> <tr><td>Balanced</td><td style="text-align: center;">%</td></tr> <tr><td>Moderate</td><td style="text-align: center;">%</td></tr> <tr><td>Conservative</td><td style="text-align: center;">%</td></tr> </tbody> </table> <p>and/or</p> <p>! You may select up to TWO from this group:</p> <table border="1"> <tbody> <tr><td>Bond</td><td style="text-align: center;">%</td></tr> <tr><td>Money Market</td><td style="text-align: center;">%</td></tr> <tr><td colspan="2" style="text-align: right;">Totals must equal 100%</td></tr> </tbody> </table>		Invest my account balance	PEPP Steps	%	Accelerated Growth	%	Growth	%	Balanced	%	Moderate	%	Conservative	%	Bond	%	Money Market	%	Totals must equal 100%		<div style="text-align: center; border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">3</div> <p style="text-align: center; font-weight: bold;">Tell us how you want your future contributions invested.</p>	<p>! These instructions cannot contradict the funds chosen in Step 2, but the allocation (%) can be different.</p> <p style="text-align: center;">Invest my future contributions</p> <table border="1"> <tbody> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> <tr><td style="text-align: center;">%</td></tr> </tbody> </table>	%	%	%	%	%	%	%	%
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This transaction will be processed based on the guidelines on the next page.

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Confirm my investment choice

In making this investment choice:

- I acknowledge that I am responsible for my investment choices.
- I understand investment choice involves risk.
- I understand it is my responsibility to seek appropriate financial counselling for making investment choices.
- I understand that if the choices I make with this form do not meet expectations, neither PEPP, nor the Government of Saskatchewan, nor any of their employees or agents, has any liability to me, arising from my choices, or acting in accordance with my instructions.

Additional instructions/comments:

Signature (electronic signature will not be accepted)

Date (day/month/year)

Step 5: To be completed by Variable Pension Benefit (VPB) members only.

5

Tell us where you want payments from

I have *one* investment fund. Make my payments by redeeming units from that fund until it is depleted (\$0.00).

I have *multiple* investment funds.

Please pro-rate the payments on the balance in each of my funds.

Please make my payments by depleting my funds in this order: 1. _____
2. _____
3. _____

! Guidelines:

- Requests received **in our office by 2:00 p.m.** are processed using the unit value based on financial market close that day. Requests received after 2:00 p.m. will use the next business day's unit value. PEPP is not responsible for any delays due to mail or fax.
- All investment option changes that you process yourself using PLANet's Manage Investments under the My Investment tab are **free of charge**.
- The first two investment option changes in a fiscal year (April 1 to March 31) that you request using this **Investment Option Change** form are free of charge. A \$30.00 processing fee is charged for the third and each subsequent investment option change you request when using this form.
- Variable Pension Benefit members only - The first payment instruction change in a fiscal year is free of charge. A \$25.00 processing fee is charged for the second and each subsequent payment change.

To be completed by PEPP Administration

Entered by: _____ on ____/____/____

Confirmed by: _____ on ____/____/____

This form is designed based on Saskatchewan legislation. Please contact PEPP if you are or were working outside of Saskatchewan as your pension may be subject to the legislation of another province.