

My Investment Option Change Form

You can complete this transaction online for **FREE** using **PLANet**. Or, submit this form to PEPP (fees may apply).

PEPP recommends you review the *PEPP Talk on Changing Your Investment Options* and complete the *My PEPP Investor Profile*, which is designed to assist you in making your investment choices. To review PEPP's investment information, visit the PEPP website at: pepp.plannera.ca. Go to the *Understand Your Pension* tab and then select *Investing In PEPP*.

1 Tell us about you	Member Number:	Mailing Address:
	Last Name:	City:
	First Name & Initial:	Province:
	Birthday (dd/mmm/yyyy):	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 specialty funds (Bond or Money Market). You may invest in one allocation fund at a time, and add one or both of the specialty funds or invest solely in specialty funds.

2 Tell us how you want your account balance invested	We will transfer your account to reflect the following instructions: New Fund Selection ! You may select ONE from this group:	3 Tell us how you want your account balance invested	! These instructions cannot contradict the funds chosen in Step 2, but the allocation (%) can be different.																														
	<table border="1"> <thead> <tr> <th></th> <th>Invest my account balance</th> </tr> </thead> <tbody> <tr><td>PEPP Steps</td><td>%</td></tr> <tr><td>Accelerated Growth</td><td>%</td></tr> <tr><td>Growth</td><td>%</td></tr> <tr><td>Balanced</td><td>%</td></tr> <tr><td>Moderate</td><td>%</td></tr> <tr><td>Conservative</td><td>%</td></tr> </tbody> </table> and/or ! You may select up to TWO from this group:				Invest my account balance	PEPP Steps	%	Accelerated Growth	%	Growth	%	Balanced	%	Moderate	%	Conservative	%	<table border="1"> <thead> <tr> <th></th> <th>Invest my future contributions</th> </tr> </thead> <tbody> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> <tr><td></td><td>%</td></tr> </tbody> </table>		Invest my future contributions		%		%		%		%		%		%	
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NOTE: This transaction will be processed based on the guidelines shown on page 2.

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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 (dd/mmm/yyyy)

5

Tell us how you would like to receive your payments

Complete this section ONLY if you are a Variable Pension Benefit (VPB) member.

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

I have **multiple** investment funds. Select the option you want PEPP to follow.

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

Withdraw 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.

To be completed by PEPP Administration

Entered by: _____ on _____
Date (dd/mmm/yyyy)

Confirmed by: _____ on _____
Date (dd/mmm/yyyy)