IMPORTANT NOTICE

Effective October 1, 2024, Counsel Portfolio Services Inc. and Canada Life Investment Management Ltd. have amalgamated to form Canada Life Investment Management Ltd. (CLIML). CLIML will now act as the fund manager, portfolio manager, trustee, and promoter for all Counsel funds. This change does not impact the management of the Counsel funds, and no action is required on your part.

Updating websites, materials, and forms to reflect this change will take some time. Until then, any references to Counsel Portfolio Services Inc. – whether online, in banking transactions or in print, including materials accompanying this notice – should be understood as referring to Canada Life Investment Management Ltd.

Please keep this notice with your records.

99-61074 - 10/24

Reset Form

RESP NON-FINANCIAL UPDATE FORM

Counsel Account No. ____________________

Subscriber's Last Name ____________________ First Name ____________________

Joint Subscriber's Last Name (if applicable) ____________________ First Name ____________________

1. Address And Personal Information Update

☐ Address update (check one only)

- ◯ All (Subscribers & Beneficiaries)
- ◯ Subscribers only
- ◯ Specific Subscriber
  Name ____________________
- ◯ Beneficiaries only
- ◯ Specific Beneficiary
  Name ____________________

Enter new address here:

☐ Personal Information Update

- ◯ Subscriber
- ◯ Beneficiary
  Name ____________________
- ◯ Social Insurance Number
- ◯ Date of Birth
- ◯ Gender

Enter change here:

2. Account Information Update

☐ Grant Fund Change

Fund Number: ____________________ Fund Name: ____________________

☐ Grant Validation Cancellation
Effective immediately, cease grant validation requests for the:

- ◯ Beneficiary
  Name ____________________
- ◯ All Beneficiaries

- ◯ Basic Canada Education Savings Grant (CESG)
- ◯ Additional Canada Education Savings Grant (CESG)
- ◯ Canada Learning Bond (CLB)

☐ Contribution Allocation Standing Instructions
Effective immediately, allocate all future purchases based on this allocation

Beneficiary	Percent Allocation (%)

☐ Contribution Allocation Current Purchase
Trade Date ____________________
Purchase Amount
$ ____________________

Beneficiary	Percent Allocation (%)

Advisor Name ____________________ **Dealer Advisor Code** ______ / ______

Advisor Signature
Subscriber(s) signature not required

Date

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COUNSEL | PORTFOLIO SERVICES