



Plan Application

Account Number: _____

- Olympia Trust Company Self-Directed Retirement Savings Plan
Olympia Trust Company Self-Directed Retirement Income Fund

2200, 125 - 9 Avenue SE Calgary, AB T2G 0P6 Phone: (403) 770-0001 Fax: (403) 261-7523
Toll Free: 1-877-565-0001 E-mail: rrsinfo@olympiustrust.com

1. Annuitant Information (please ensure that each item is completed.)

Form fields for Annuitant Information: Last Name, First Name, Middle Name, Address, City, Province, Postal Code, Fax Number, Email, S.I.N., Date of Birth, Month / Day / Year, Residence Telephone Number, Business Telephone Number, Cellular Number.

2. Plan Information

- A. Plan Type (check one): RSP, Spousal RSP, LRSP/LIRA, RIF, Spousal RIF, Prescribed RIF, LRIF, New LIF (ONT), RLIF (FED), RLSP (FED), LIF
B. For Locked-In Plans - Applicable Pension Legislation (check one): BC, AB, SK, MB, ON, Quebec, Federal
C. For Alberta Legislation only - I am: the original owner, a surviving pension partner owner, a non-member-pension partner
D. For RIFs and LIFs Only (check if applicable): Deposits are from a RIF established prior to 1993

3. Contributor Information (Must be completed for a spousal plan)

Form fields for Contributor Information: Last Name, First Name, Initial, S.I.N., Date of Birth, Month / Day / Year.

4. RIF/LIF/LRIF Withdrawal

- A. Amount: Minimum, Maximum (LRIF/LIF/RLIF only), Other (Subject to allowable limits)
B. Cash or In-Kind (Processed only on an annual basis)
C. Frequency: Quarterly, Semi-Annually (months of &), Annually month
D. Payment Date 1st of the Month, 15th of the Month
E. Base the RIF payouts on spouse's age:

Name, S.I.N., Date of Birth, Month / Day / Year

- F. EFT (Electronic Fund Transfer) Please complete the attached Pre-Authorized Debt/Credit/Refund Agreement Form

5. Beneficiary Designation (Optional)

I designate the person named below as beneficiary of my Plan if that person is living at the date of my death. I reserve the right to revoke this designation:

Name of Beneficiary: _____ Relationship to Me: _____ Initials of Annuitant _____

This designation may not be valid in all provinces. If the beneficiary is not living at the date of death, or in the absence of a designated beneficiary on this form or in your will, the proceeds of this Plan will be paid to your estate.

(For RIF, LIF or LRIF only, please check if applicable) I elect that my spouse continue to receive the payments as successor annuitant under the relevant Fund, provided the Fund is still active on my death or until the Fund ceases.

6. Canadian Public Issuers Mailings

Under Canadian provincial securities laws, you are entitled to receive a copy of all security holder materials from Canadian public issuers whose securities you hold. You can choose not to receive certain types of security holder materials. This includes financial statements and proxy related materials for meetings where "routine" business is conducted. However, it excludes proxy-related materials for meetings where "non-routine" business is conducted.

I have read and understand the "Shareholder Communication Information" that you have provided to me and the choices indicated by me apply to securities of all Canadian reporting issuers held in this account.

PART 1 – DISCLOSURE OF BENEFICIAL OWNERSHIP INFORMATION

Please mark the corresponding box to show whether you DO NOT OBJECT or OBJECT to us disclosing your name, address, electronic mail address, securities holdings and preferred language of communication to Canadian issuers of securities you hold with us and to other persons or companies in accordance with Canadian provincial securities law.

- I DO NOT OBJECT to you disclosing the information described above.
- I OBJECT to you disclosing the information described above.

PART 2 – RECEIVING SECURITY HOLDER MATERIALS

Please mark the corresponding box to show whether you WANT to receive ALL materials sent to beneficial owners of securities or whether you DECLINE to receive certain materials

- I WANT to receive ALL security holder materials sent to beneficial owners of securities.
- I DECLINE to receive all of the following materials: (a) proxy-related materials that are sent in connection with a security holder meeting at which only "routine business" is to be conducted; (b) financial statements and annual reports that are not part of proxy-related materials; and (c) materials sent to security holders that are not required by corporate or securities law to be sent. (Even if I decline to receive these types of materials, I understand that a reporting issuer or other person or company is entitled to send these materials to me at its expense).

PART 3 – CONSENT TO MAILING COST

This section must be completed only if you have marked the "I OBJECT" box in PART 1 of this form. If this section is not completed you will be DEFAULTED to "I DO NOT WISH TO PAY". If you have marked the "I DO NOT OBJECT" box in PART 1 of this form, you are NOT subject to any mailing costs and are not required to complete this section.

- I WISH TO PAY for the delivery to me of any security holder materials that I may be entitled to receive under Canadian provincial securities legislation IF the Canadian reporting issuer or other party initiating the mailing has refused to pay the cost of delivery.
- I DO NOT WISH TO PAY for the delivery to me of any security holder materials that I may be entitled to receive under Canadian provincial securities legislation IF the Canadian reporting issuer or other party initiating the mailing has refused to pay the cost of delivery. I understand that I will not receive mailings for which the Canadian reporting issuer or other party initiating the mailing has refused to pay the cost of delivery. This could include non-routine and significant corporation action related mailings. **(DEFAULT CHOICE)**

7. Confirmation of Application

To: Olympia Trust Company

Please apply for registration of the Olympia Trust Company Self-Directed Retirement Savings Plan, or Olympia Trust Company Self-Directed Retirement Income Fund, under the Income Tax Act (Canada) and if applicable, under the Taxation Act (Quebec) as: (a) a Retirement Savings Plan if I have selected RSP, Spousal RSP, or locked-in RSP/LIRA, as my plan type; or (b) a Retirement Income Fund if I have selected RIF, Spousal RIF, Prescribed RIF, LRIF, RLSP, LIF/RLIF or New LIF as my plan type. I certify that the information contained in this Plan Application is true and correct, and that I have read and am bound by the attached Declaration of Trust that governs my Plan and any applicable Locking-in Supplements. I understand that it is my responsibility to arrange for the transfer of assets to my Plan from any predecessor retirement plan or other permitted source.

X

Annuitant Signature

Date

Authorized Olympic Trust Company Signing Officer

8. Terms and Conditions

In consideration of the Trustee accepting this account, I agree that:

- a) The Trustee has the right to reject an order if the proper documentation is not in place or if the investment is not RSP-eligible.
- b) I am responsible for all commissions payable in respect of my orders.
- c) I will pay the Trustee any amounts owing to them and any fees as outlined in the Olympia Trust Company Fee Schedule. In addition, the Trustee can sell securities in my account or otherwise deduct from my account any amounts owing to them.
- d) I will notify Olympia Trust Company in writing about any errors or omissions within the time limits specified on confirmations, statements or other notices.
- e) I will advise Olympia Trust Company of any changes to my account in writing.
- f) I understand that Olympia Trust Company is a non-deposit taking Trust Company. Any cash held in Trust is non-interest bearing.
- g) I hereby acknowledge and agree that all telephone calls to and from Olympia Trust Company ("Olympia") may be recorded for training purposes. By recording the telephone calls, Olympia may collect personal information about me. I hereby consent to Olympia recording all telephone calls for training purposes.

X

Annuitant Signature

Date

Privacy Notice

At Olympia Trust Company, we take privacy seriously. In providing services to you, we receive non-public, personal information about you. We receive this information through transactions we perform for you and may also receive information about you by virtue of your transactions with affiliates of Olympia Trust Company or other parties. Olympia Trust Company is committed to respecting and protecting the confidentiality of your personal information and the safeguarding of all personal information entrusted to us. We have prepared a Privacy Policy to tell you more about how we protect your personal information. It is available on our website at www.olympiustrust.com