

## INVESTOR INFORMATION FORM

FULL NAME \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

RESIDENTIAL ADDRESS \_\_\_\_\_

CELL PHONE NO. \_\_\_\_\_ WORK PHONE NO. \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_ S.I.N. \_\_\_\_\_

IS THE INVESTOR A RESIDENT OF BC?  YES  NO

IF NO, PLEASE LIST THE COUNTRY OF RESIDENCE \_\_\_\_\_

BENEFICIARY NAME \_\_\_\_\_

RELATIONSHIP OF BENEFICIARY \_\_\_\_\_

BENEFICIARY DATE OF BIRTH \_\_\_\_\_ BENEFICIARY S.I.N. \_\_\_\_\_

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ACCOUNT YOU WOULD LIKE TO INVEST:

NON-REG  TFSA  RRSP  SPOUSAL RRSP  RRIF  LIRA  RESP

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IF RESP, RRSP, OR TFSA, WILL YOU BE TRANSFERRING FUNDS FROM AN EXISTING RRSP OR TFSA ACCOUNT?

YES  NO AMOUNT IF NOT FULL TRANSFER \_\_\_\_\_

*If transferring RESP, RRSP, or TFSA funds, please provide a copy of your current investment statements.*

PLEASE PROVIDE A COPY OF DRIVER'S LICENCE AND A VOID CHEQUE.

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AMOUNT YOU WOULD LIKE TO INVEST:

\$ \_\_\_\_\_

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I ELECT TO RECEIVE QUARTERLY DIVIDENDS AS FOLLOWS:

Reinvest as Additional Preferred Shares  Receive Dividend as Cash

Please indicate if you would like to be added to our mailing list  YES  NO

By selecting Yes, you consent to *PHL Financial Group Ltd.* ("PHL") and *Morteq Lending Corporation* ("Morteq") contacting you electronically regarding their events, announcements. You may unsubscribe from receiving these e-mails at any time, including by clicking on the "unsubscribe" link at the bottom of e-mails received from us. Please refer to the *PHL Privacy Policy* or contact us if you have any questions.

Our *Privacy Policy* also explains how *PHL* and *Morteq* manage the personal information that you provide to us on this form. The *Privacy Policy* is available on our website (<https://phlfinancial.com>), or from our *Privacy Officer*, whom you can contact at [privacy@phlfinancial.com](mailto:privacy@phlfinancial.com).

*By signing below, I certify all information is true and correct to the best of my knowledge.*

\_\_\_\_\_  
*Signature*