

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 PROVINCE OF RESIDENCE _____

BENEFICIARY NAME _____ RELATIONSHIP TO ME _____

ADDRESS _____ CELL PHONE _____

BENEFICIARY NAME _____ RELATIONSHIP TO ME _____

ADDRESS _____ CELL PHONE _____

Percentage of Allocation (must add up to 100%): 1. ____ 2. ____

SELECT ONE:

- Please add Beneficiaries as noted above to plan account(s) noted below only
 Please add Beneficiaries as noted above to below plan account(s) and any plans opened in future

ACCOUNT YOU WOULD LIKE TO INVEST:

NON-REG TFSA RRSP SPOUSAL RRSP RRIF LIRA RESP

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.

AMOUNT YOU WOULD LIKE TO INVEST:

\$ _____

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.

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

Signature