



Politically Exposed Persons Verification

You must submit this form if:

- 1) The product being sold is a non-registered annuity (fund) or a Universal Life policy; and
- 2) The lump-sum premium is at least \$100 000; and
- 3) The owner is an individual.

Identification

Owner's name:	Co-Owner's name:
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Section A

<p>Have you (the owner or co-owner) or your spouse or common-law partner, father or mother, father- or mother-in-law, child, brother or stepbrother, or sister or stepsister ever held any of the following positions for a country other than Canada:</p>	
<ol style="list-style-type: none"> 1. Head of state or head of government 2. Member of the executive council of government 3. Head of a government agency 4. President of a state-owned company or state-owned bank 5. Deputy minister or equivalent 	<ol style="list-style-type: none"> 6. Ambassador or attaché or counselor of an ambassador 7. Judge 8. Military officer with a rank of general or above 9. Member of a legislature 10. Leader or president of a political party represented in a legislature
<p>Owner Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Co-Owner Yes <input type="checkbox"/> No <input type="checkbox"/></p>	

- If both the owners answered NO to the above question, complete the Signature section and submit this form with the application or contract.
- If one of the owners answered YES to the above question, complete Section B and the Signature section of this questionnaire and submit this form with the application or contract.

Section B

Owner or co-owner's name	Name of the Politically exposed person (if other than owner)	Relationship to owner or co-owner (see section A)	Position held (see list 1-10 above)	Country where position held

Source of funds
Please provide an explanation as to the source of the funds being used to purchase the policy.

Signature

Owner: _____	Co-Owner: _____
Representative: _____	Date: _____
Please submit this form with the application or contract	