UV INSURANCE

INDIVIDUAL INSURANCE

Rate Guarantee Agreement

EQC033

Important: Fill out in block letters and answer each section as accurately as possible.

Section A – Collection of Personal Information

The personal information we collect in this form allows UV Insurance to proceed with the rate guarantee agreement.

The personal information is used to:

- Identify the individual
- Establish and update information and the needs of the individual, as appropriate
- Comply with legal and regulatory requirements, including tax rules and the prevention, detection and enforcement of offences, cyber threats and fraud.

The information disclosed on this form will be forwarded to the UV Insurance staff in charge of processing the claim, as well as to any other person authorized by law.

Section B – Request Details

1. Contract # _____ Certificate # _____
2. Renewal date Y M D
3. Annuitant's first name _____ Last name _____

☐ **Renewal** Rate guarantee valid for 45 days	☐ **New deposit** Rate guarantee valid for 15 days	☐ **Transfer of a Guaranteed Investment Certificate (GIC)** Rate guarantee valid for 45 days

4. Estimated date of availability of the invested amount Y M D
5. Amount invested (minimum $500) $ _____
6. ☐ Tick if this is a renewal

Section C – Rate Confirmation

I hereby request that UV Insurance guarantee an interest rate of _____ % for a period of _____ for the amount shown in section B.

☐ Compound interest

☐ Simple interest (available only for non-registered contracts and TFSAs)

☐ Annual ☐ Monthly (current rate reduced by 0.50%)

Section D – Consent and Signature

By signing, you understand that if any of your personal information is inaccurate, incomplete, or ambiguous, you may request a correction by contacting UV Insurance. You also have the right to request information about how your personal information is used.

In addition, you may withdraw your consent to the disclosure or use of your personal information at any time by contacting the UV Insurance Privacy Officer at the following address: 1990 Jean-Berchmans-Michaud Street, Drummondville, QC J2C 7G7.

For further details, please visit our website and consult our **Privacy Policy.**

The undersigned confirms that they have reviewed the above information and agrees to the collection, use and disclosure of the personal information contained herein. This consent also applies to the collection, use, and disclosure of the beneficiaries' personal information, and the undersigned confirms that prior consent has been obtained from such beneficiaries.

Signatures

By signing below, the undersigned certifies that the information provided is complete and true and that a photocopy of this document is of the same value as the original.

Signed in _____ Date Y M D

X _____ **X** _____

Signature of annuitant or owner | Advisor's signature

No rate guarantee agreement may be submitted **more than 45 days from the date of renewal**.

Section E – Rate Guarantee Procedure

* UV Insurance accepts electronic signatures on PDF applications under certain conditions.
  Please see the terms and conditions for electronic signatures in the Investment section of our website.

Renewal	Transfer	New deposit	
Validity (calendar days)			
45 days	45 days	15 days	
Requirements		**By cheque**	**By PAD**
Client's signature (original is not required on a letter of direction or our "Interest Rate Guarantee Agreement" form). OR Advisor's email to **ind.investissement@uvassurance.ca** with the client's name, the product and the selected term.	Copy of the application and the transfer form with handwritten signature. OR PDF application with electronic signature,* by email/fax with contract # if applicable (additional deposit). OR Email to **ind.investissement@uvassurance.ca** with the client's name, the amount to be received, the product chosen, the requested rate, the expected date of receipt of funds and the transferring institution. The deposit (transfer cheque) must be received at our offices within 45 days of the rate guarantee request and be redeemable within that period.	Copy of the application with handwritten signature. OR PDF application with electronic signature* and cheque, by email/fax with contract # if applicable (additional deposit). OR Email to **ind.investissement@uvassurance.ca** with the client's name, the amount to be received, the product chosen, the requested rate and the expected date of receipt of the funds. The original application (hard copy with handwritten signature) must be mailed with the cheque. It must be received at our offices within 15 days following the rate guarantee request. The cheque must be cashable within this timeframe.	Copy of the application with handwritten signature. OR PDF application with electronic signature* and copy of preprinted specimen cheque, by email/fax with contract # if applicable (additional deposit). OR Email to **ind.investissement@uvassurance.ca** with the client's name, the product selected and the requested rate. The duly completed documents must be received within 15 days following the rate guarantee request and the withdrawal must be able to be made within that period.
Rate granted			
The higher of the guaranteed rate and the rate in force on the renewal date.	The highest among the guaranteed rate, the rate in force on the application reception date (handwritten signature or PDF application with electronic signature*) and the rate in force on the deposit reception date.	The highest among the guaranteed rate, the rate in force on the document reception date and the highest rate offered between the date of the rate guarantee and the document reception date.	

Send the form to the following email address: ind.client@uvinsurance.ca
P.O. Box 696, Drummondville (Quebec) J2B 6W9 ■ Phone: 819 478-1315 ■ Toll-free: 1 800 567-0988 ■ Fax: 819 474-1990
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