



### 3. Beneficiary/Successor Annuitant Designation

You may wish to discuss this designation with your legal advisor. If a successor annuitant is selected, payments will continue to your Spouse upon your death.

In the event of my death, I elect the person named below as beneficiary.

Name \_\_\_\_\_  
Given Name Initial(s) Surname

Relationship \_\_\_\_\_

Spouse Successor Annuitant (only available for RIF plans)  Yes  No

### 4. RIF Transfers Made Easy

For non-TD Mutual Funds RSP transfers, please attach the appropriate transfer forms and a copy of your most recent statement. Your Mutual Funds Representative will assist in completing the required transfer forms.

Please complete to transfer your RIF to TD \_\_\_\_\_  
Given Name Initial(s) Surname

TD Mutual Funds Account Number \_\_\_\_\_ Social Insurance No. \_\_\_\_\_

You wish to open a  RIF  Spousal RIF  LIF  LRIF  
 by transferring all of the dollars in your existing plan or \$ \_\_\_\_\_  
 in cash  in kind

Has your spouse ever contributed to the RIF?  Yes  No

Internal Use: Please attach to a Transfer Authorization for Registered Investments

Following are the details of the existing Plan from which I wish to transfer funds.

Plan No. \_\_\_\_\_ Name of Plan \_\_\_\_\_

Issuer of Plan (financial institution) \_\_\_\_\_ Maturity Date (if applicable) \_\_\_\_\_

Address of Issuer \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Please sign here to authorize the transfer.

Signature of Annuitant  \_\_\_\_\_ Date \_\_\_\_\_

### 5. Please Tell Us How You Would Like to Invest Your Money

List the TD Mutual Funds you have chosen, as well as the fund number and dollar amount for each fund.

Applicable Fund minimums apply. Please see the Prospectus for details.

Please note: Investment income from dividends and interest will be automatically reinvested in additional units.

Fund No.	Fund Name	Amount \$
1.	_____	\$ _____
2.	_____	\$ _____
3.	_____	\$ _____
4.	_____	\$ _____
5.	_____	\$ _____
6.	_____	\$ _____
7.	_____	\$ _____
<b>Total</b>		\$ _____

### 6. Scheduled Payment Information

For RIF, LIF or LRIF plans, you are required to redeem at least the RIF Annual Minimum Payment (AMP) as income beginning the second calendar year of your contract. As there is no AMP for the plan's first year, any amount withdrawn is subject to withholding tax.

If a Client Specified Amount payment is selected, the amount must be greater than the RIF AMP, and for LIF and LRIF, less than the LIF/LRIF Maximum.

Where the Annual Minimum Payment exceeds the maximum payment for a LIF or LRIF, the AMP must be withdrawn.

If a Client Specified Amount tax withholding is selected, the amount will be in addition to the minimum withheld.

Scheduled Retirement Payment (SRP) Option (please select one)  RIF/LIF/LRIF Minimum  
(all payment amounts will be treated as gross)  LIF/LRIF Maximum  
 Client Specified Amount \$ \_\_\_\_\_

Tax Withholding  Minimum  
 Client Specified Amount \$ \_\_\_\_\_

Tax Method  After Minimum  
 Pro-Rata

Payment Frequency  Weekly  Bi-Weekly  
 Monthly  Quarterly  
 Semi-Annually  Annually

Payment Start Date \_\_\_\_\_  
(Select any date in next calendar year)  
Year Month Date

**6. Scheduled Payment Information (cont'd)**

You have the option of selecting how you would like to receive your Scheduled Retirement Payments (SRPs). Payments can be deposited into your TD Canada Trust savings/chequing account, or into your bank account at another financial institution. You may also elect to have a cheque mailed to you.

As noted in Section 2, you have the option of using your spouse's date of birth when determining your payment schedule. Using a younger spouse's date of birth may result in lower minimum payments.

Once the first payment has been made from the Plan, this decision becomes irrevocable.

**Payment Method**

TD Canada Trust Bank account

Branch \_\_\_\_\_

Account \_\_\_\_\_

Name on Account \_\_\_\_\_

Other Bank account

Financial Institution \_\_\_\_\_

Institution Number \_\_\_\_\_

Branch \_\_\_\_\_

Account \_\_\_\_\_

Name on Account \_\_\_\_\_

Cheque (will be mailed to the address in Section 1)

**Payments Based Upon Age of Spouse**

I hereby elect to use my spouse's date of birth (in Section 2) for determining the payments from my Fund.

I do not elect to use my spouse's date of birth (in Section 2) for determining the payments from my Fund.

LIF/LRIF - In some cases, the spouse's age cannot be used to determine payments from the Fund.

**7. TD Canada Trust EasyLine or TD Canada Trust EasyWeb Registration**

**If you would like to invest by calling TD Canada Trust EasyLine or using TD Canada Trust EasyWeb on the Internet, please complete the following:**

E-mail address \_\_\_\_\_ to be used for TD Canada Trust EasyWeb online investing.

**8. Withdrawal Instructions**

Based on the funds noted in Section 5, Investment Instructions, please choose how you would like to make withdrawals in order to meet your scheduled payments.

Largest Fund

• withdrawal will be made from the largest fund based on the market value at the time of each payment

Pro-Rate

• withdrawal will be made proportionately from each fund based on the percentage weighting each fund holds of the total market value at the time of each payment

Flat Amount/Specified Fund

• withdrawal will be made from funds specified below, based on a flat amount

<b>Fund No.</b>	<b>Fund Name</b>	<b>Flat Amount \$</b>
1. _____	_____	\$ _____
2. _____	_____	\$ _____
3. _____	_____	\$ _____
4. _____	_____	\$ _____
5. _____	_____	\$ _____
6. _____	_____	\$ _____
7. _____	_____	\$ _____
<b>Total</b>		\$ _____

**9. Use of Information**

In this section, the word *Information* means your personal information (except health Information). It includes Information provided to us by you, including through the products and services you use, and obtained from others with your consent. You agree as follows:

**How We Use Information:** We may use Information: to establish and serve you as our customer; to determine whether any products or services of the TD Bank Financial Group\* are suitable for you and offer them to you; or as required and permitted by law. When you provide us with your Social Insurance Number, we may use it to keep your Information separate from that of other customers with a similar name, including Information obtained through the credit approval process. We may share Information within the TD Bank Financial Group, where permitted by law.

You may revoke your consent at any time and will thereafter not be offered products or services by other members of TDBFG. However, information will continue to be shared within TDBFG, or with third party service providers, where reasonably necessary to service your TD Mutual Funds account.

*You may obtain our privacy code - "Protecting Your Privacy" - or review your options for refusing or withdrawing this consent, including your option not to be contacted about offers of products or services, by contacting your branch or calling us at 1-866-567-8888.*

By initialing below, you consent to the use of information as described.

**Initial of Annuitant** \_\_\_\_\_

## 10. Important Customer Information

TD Investment Services Inc. ("TDIS") is a separate company from and a wholly-owned subsidiary of The Toronto-Dominion Bank. **Mutual Fund investments fluctuate in value and are not insured by the Canada Deposit Insurance Corporation or the Régie de l'assurance-dépôts du Québec and are not guaranteed by The Toronto-Dominion Bank.**

You have read and hereby acknowledge the above disclosure:

Initial of Annuitant \_\_\_\_\_

## 11. Application, Authorization, Disclosure, and Registration

Unless otherwise indicated, throughout the application and in our other documents, the words "you," "your" and "yours" mean the annuitant (and any co-applicant or other individuals with authority over the account). The words "we," "us" and "our" mean TD Asset Management Inc. (TDAM) and TD Investment Services Inc. (TDIS) and/or TD Bank Financial Group.\*

I am applying to purchase units of the TD Mutual Funds and/or TD Managed Assets Program<sup>®</sup> indicated on this application.

**Within two (2) business days of the Acceptance of the first Contribution to your TDIS Account, we will send you a current copy of the Simplified Prospectus for the Applicable Portfolio and/or Mutual Fund(s).**

You hereby acknowledge that we will send you the Disclosure Document within two (2) business days of acceptance of first contribution, containing the Statement of Policies/Statement of Related Issuers (Alberta residents only)/Conflict of Interest Rules Statement (B.C. residents only).

You understand that this subscription is made on the terms and conditions described in the prospectus and that it is subject to approval by TDAM. TDAM reserves the right to accept or reject any purchase order within one (1) business day of receipt of the order.

You acknowledge that for our mutual protection, TDIS will record all telephone calls by which your orders are placed.

**Request to register the Fund: To: The Canada Trust Company (the "Trustee"):** You hereby apply for membership in a TD Mutual Funds Retirement Income Fund (the *Fund*) in accordance with the Declaration of Trust for the Fund. You understand that all references in the Declaration of Trust (and locked-in addendum, where applicable) to this application are to be read and understood as references to this application. You agree on behalf of yourself, your executors and administrators to be bound by the terms of the Fund. You request that the Fund be registered as a Retirement Income Fund under the *Income Tax Act (Canada)*. If you have indicated above that you reside in the Province of Québec, you also request that the Fund be registered as a Retirement Income Fund under the *Taxation Act (Québec)*. All contributions to the Fund are to be invested by the Trustee as directed by you in accordance with the terms of the Fund and held in your account subject to the terms of the Fund. You understand that all amounts received by you or your spouse from the Fund are taxable under the provisions of the *Income Tax Act (Canada)*.

Most TD Mutual Funds charge an early redemption fee within a certain number of days after purchase. Please refer to the prospectus or ask a Mutual Funds Representative for applicability to the Funds you are purchasing.

\* The TD Bank Financial Group means The Toronto-Dominion Bank and its affiliates, who provide deposit, investment, loan, securities, trust, insurance and other products or services.

X

Signature of Annuitant

Date \_\_\_\_\_

Initial of Annuitant \_\_\_\_\_

By initialing, I hereby acknowledge receipt of all required federal and/or provincial addenda.

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## For Quebec Residents Only. Language Preference Agreement (Quebec residents who have requested English language only).

If you are a Quebec resident, you agree with the following statement: It is my express wish that this application and any related documents be in English. *J'ai exigé que la présente formule et tous les documents s'y rattachent soient rédigés en anglais.*

Initial \_\_\_\_\_

**BRANCH USE ONLY** Division Name \_\_\_\_\_ Branch No. 3577  
Branch Manager Signature \_\_\_\_\_ Branch Manager Rep. Code \_\_\_\_\_ Branch Tel # ( ) \_\_\_\_\_  
Reg. Sales Person Name \_\_\_\_\_ Rep Code \_\_\_\_\_

Original - Branch  
Copy - Customer

# Wealth Allocation Model

Our Wealth Allocation Model<sup>®†</sup> helps you establish your Investor Profile and the optimal asset mix (the percentage of money market, income and growth investments) for your portfolio. It then shows you how to match your Investor Profile with a recommended Registered Savings Plan (RSP), Retirement Income Option (RIO), Registered Education Savings Plan (RESP) or Non-Registered mutual funds portfolio.

By following the recommendations, you can be confident that you're investing in a portfolio that's right for you. You'll increase your potential for higher returns while keeping your investment risk at a comfortable level.

You can invest in the recommended portfolio of TD Mutual Funds<sup>®†</sup> or choose one of our TD Managed Portfolios through the TD Managed Assets Program<sup>®†</sup> (TD MAP<sup>®</sup>) and leave the decision making and monitoring to the professionals. Either way, you'll benefit from a carefully diversified portfolio that reflects your investment needs and objectives.

## We're here to help

If you would like assistance completing this questionnaire and selecting your portfolio, or if you are ready to make your investment, we're here to help.

Please call **1-800-281-8029** or visit [www.tdcanadatrust.com/mutualfunds](http://www.tdcanadatrust.com/mutualfunds) or speak with a Mutual Funds Representative at your TD Canada Trust branch.

Increase your  
potential for  
higher returns



Expiry date: October 31, 2003



# STEP 2

Match your point score to the chart to determine your Investor Profile and the asset mix that's appropriate for you.

Point Score	Investor Profile		RSP/RIO Asset Mix		Non-Registered/RESP Asset Mix	
6-12	<b>Safety of Principal</b>	Investment Objective: Safety: 75% Income: 25%	<p>Fixed Income 25%</p> <p>Safety 75%</p>		<p>Investment Objective: Safety: 75% Income: 25%</p> <p>Fixed Income 25%</p> <p>Safety 75%</p>	
13-19	<b>Income</b>	Investment Objective: Income: 70% Growth: 30%	<p>International Equity 9%*</p> <p>U.S. Equity 12%*</p> <p>Canadian Equity 9%</p> <p>Fixed Income 70%</p> <p>*(or 21% Global Equity)</p>	Recommended Maximum Foreign Exposure: 21%	<p>Investment Objective: Income: 65% Growth: 35%</p> <p>International Equity 10%*</p> <p>U.S. Equity 14%*</p> <p>Canadian Equity 11%</p> <p>Fixed Income 65%</p> <p>*(or 24% Global Equity)</p>	Recommended Maximum Foreign Exposure: 24%
20-26	<b>Income and Moderate Growth</b>	Investment Objective: Income: 55% Growth: 45%	<p>International Equity 14%*</p> <p>U.S. Equity 18%*</p> <p>Canadian Equity 13%</p> <p>Fixed Income 55%</p> <p>*(or 32% Global Equity)</p>	Recommended Maximum Foreign Exposure: 32%	<p>Investment Objective: Income: 50% Growth: 50%</p> <p>International Equity 15%*</p> <p>U.S. Equity 20%*</p> <p>Canadian Equity 15%</p> <p>Fixed Income 50%</p> <p>*(or 35% Global Equity)</p>	Recommended Maximum Foreign Exposure: 35%
27-34	<b>Balanced Growth</b>	Investment Objective: Income: 40% Growth: 60%	<p>International Equity 18%*</p> <p>U.S. Equity 25%*</p> <p>Canadian Equity 17%</p> <p>Fixed Income 40%</p> <p>*(or 43% Global Equity)</p>	Recommended Maximum Foreign Exposure: 43%	<p>Investment Objective: Income: 35% Growth: 65%</p> <p>International Equity 20%*</p> <p>U.S. Equity 27%*</p> <p>Canadian Equity 18%</p> <p>Fixed Income 35%</p> <p>*(or 47% Global Equity)</p>	Recommended Maximum Foreign Exposure: 47%
35-42	<b>Aggressive Growth</b>	Investment Objective: Income: 20% Growth: 80%	<p>International Equity 25%*</p> <p>U.S. Equity 34%*</p> <p>Canadian Equity 21%</p> <p>Fixed Income 20%</p> <p>*(or 59% Global Equity)</p>	Recommended Maximum Foreign Exposure: 59%	<p>Investment Objective: Income: 20% Growth: 80%</p> <p>International Equity 26%*</p> <p>U.S. Equity 33%*</p> <p>Canadian Equity 21%</p> <p>Fixed Income 20%</p> <p>*(or 59% Global Equity)</p>	Recommended Maximum Foreign Exposure: 59%
43-48	<b>Maximum Equity Growth</b>	Investment Objective: Growth: 100%	<p>International Equity 32%*</p> <p>U.S. Equity 43%*</p> <p>Canadian Equity 25%</p> <p>*(or 75% Global Equity)</p>	Recommended Maximum Foreign Exposure: 75%	<p>Investment Objective: Growth: 100%</p> <p>International Equity 32%*</p> <p>U.S. Equity 43%*</p> <p>Canadian Equity 25%</p> <p>*(or 75% Global Equity)</p>	Recommended Maximum Foreign Exposure: 75%

## STEP 3 Select your diversified portfolio.

Now go to the TD Mutual Funds Portfolios on this page or the TD MAP Portfolios on the next page. Choose between the RSP/RIO and Non-Registered/RESP portfolios as appropriate and match your point score and Investor Profile to the recommended portfolio.

For RSP/RIO portfolios, we have taken into account Canada Customs and Revenue Agency's current foreign content restrictions and have used Global RSP Funds\* to extend foreign exposure as recommended in the model portfolios.

### TD Mutual Funds Model Portfolios

These are the recommended RSP/RIO and Non-Registered/RESP TD Mutual Funds Portfolios for each of the Investor Profiles. Should you decide to alter the recommended funds or their percentage weightings, be sure that you stay within your asset mix objectives.

### RSP/RIO Investment Model Portfolios – TD Mutual Funds

Lump Sum Minimum – \$100 per fund Pre-Authorized Purchase Plan (PPP) Minimum – \$25 per fund

RSP/RIO	PURCHASE OPTION 1 Lump Sum Purchase	PURCHASE OPTION 2 Pre-Authorized Purchase Plan	Safety of Principal 6 - 12 points	Income 13 - 19 points	Income and Moderate Growth 20 - 26 points	Balanced Growth 27 - 34 points	Aggressive Growth 35 - 42 points	Maximum Equity Growth 43 - 48 points
	<\$5,000	<\$250	100% TD Canadian Money Market Fund	100% TD Canadian Bond Fund	100% TD Balanced Income Fund	100% TD Balanced Growth Fund	100% TD Balanced Growth Fund	100% TD Global Select RSP Fund
	\$5,000+	\$250+	75% TD Canadian Money Market Fund 25% TD Canadian Bond Fund	15% TD Short Term Bond Fund 55% TD Canadian Bond Fund 10% TD Canadian Blue Chip Equity Fund 10% TD U.S. Equity Fund <sup>Δ</sup> 10% TD International Equity Fund <sup>Δ</sup>	55% TD Canadian Bond Fund 15% TD Canadian Blue Chip Equity Fund 10% TD U.S. Equity Fund <sup>Δ</sup> 10% TD International Equity Fund <sup>Δ</sup> 10% TD Global Select RSP Fund	40% TD Canadian Bond Fund 18% TD Canadian Blue Chip Equity Fund 16% TD U.S. Equity Fund <sup>Δ</sup> 12% TD International Equity Fund <sup>Δ</sup> 14% TD Global Select RSP Fund	20% TD Canadian Bond Fund 22% TD Canadian Equity Fund 10% TD AmeriGrowth RSP Fund 12% TD U.S. Blue Chip Equity Fund <sup>Δ</sup> 16% TD International Equity Fund <sup>Δ</sup> 20% TD Global Select RSP Fund	26% TD Canadian Equity Fund 10% TD AmeriGrowth RSP Fund 10% TD U.S. Blue Chip Equity RSP Fund 10% TD U.S. Mid-Cap Growth Fund <sup>Δ</sup> 18% TD International Equity Fund <sup>Δ</sup> 26% TD Global Select RSP Fund

<sup>Δ</sup> Subject to Foreign Content Restrictions.

### Non-Registered/RESP Investment Model Portfolios – TD Mutual Funds

Lump Sum Minimum – \$1,000 per fund Pre-Authorized Purchase Plan (PPP) Minimum – \$25 per fund

NON-REGISTERED/RESP	PURCHASE OPTION 1 Lump Sum Purchase	PURCHASE OPTION 2 Pre-Authorized Purchase Plan	Safety of Principal 6 - 12 points	Income 13 - 19 points	Income and Moderate Growth 20 - 26 points	Balanced Growth 27 - 34 points	Aggressive Growth 35 - 42 points	Maximum Equity Growth 43 - 48 points
	<\$5,000	<\$250	100% TD Canadian Money Market Fund	100% TD Canadian Bond Fund	100% TD Balanced Income Fund	100% TD Balanced Growth Fund	100% TD Balanced Growth Fund	100% TD Global Select Fund
	\$5,000 to \$9,999	\$150 to \$249	75% TD Canadian Money Market Fund 25% TD Canadian Bond Fund	60% TD Canadian Bond Fund 20% TD Balanced Growth Fund 20% TD Global Select Fund	50% TD Canadian Bond Fund 20% TD Canadian Blue Chip Equity Fund 30% TD Global Select Fund	35% TD Canadian Bond Fund 23% TD Canadian Blue Chip Equity Fund 42% TD Global Select Fund	50% TD Balanced Growth Fund 28% TD U.S. Equity Fund 22% TD International Equity Fund	30% TD Canadian Equity Fund 40% TD U.S. Blue Chip Equity Fund 30% TD International Equity Fund
\$10,000+	\$250+	75% TD Canadian Money Market Fund 25% TD Canadian Bond Fund	15% TD Short Term Bond Fund 50% TD Canadian Bond Fund 12% TD Canadian Blue Chip Equity Fund 13% TD U.S. Equity Fund 10% TD International Equity Fund	50% TD Canadian Bond Fund 17% TD Canadian Blue Chip Equity Fund 13% TD U.S. Equity Fund 10% TD International Equity Fund 10% TD Global Select Fund	35% TD Canadian Bond Fund 20% TD Canadian Blue Chip Equity Fund 17% TD U.S. Equity Fund 13% TD International Equity Fund 15% TD Global Select Fund	20% TD Canadian Bond Fund 22% TD Canadian Equity Fund 22% TD U.S. Blue Chip Equity Fund 16% TD International Equity Fund 20% TD Global Select Fund	26% TD Canadian Equity Fund 20% TD U.S. Blue Chip Equity Fund 10% TD U.S. Mid-Cap Growth Fund 18% TD International Equity Fund 26% TD Global Select Fund	

# STEP 3 CONT'D – TD MANAGED ASSETS PROGRAM PORTFOLIOS

These are the recommended, professionally managed RSP/RIO and Non-Registered/RESP TD MAP Portfolios for each of the Investor Profiles. The asset allocation and fund selection in TD MAP Portfolios are carefully determined by our team of investment professionals. Please note that investors cannot change the fund selection or the percentage of the portfolio each fund represents.†

Minimum Initial Investment: \$2,000 PPP: \$25	Minimum Initial Investment: \$5,000 <sup>◇</sup> PPP: \$25
<b>TD MAP RSP/RIO Portfolios</b>	<b>TD MAP Non-Registered/RESP Portfolios</b>
<p><b>TD Managed Income</b> 13-19 points</p> <ul style="list-style-type: none"> <li>TD Dividend Growth Fund 9%</li> <li>TD Canadian Blue Chip Equity Fund 5%</li> <li>TD Canadian Bond Index Fund 20%</li> <li>TD Canadian Bond Fund 35%</li> <li>TD Short Term Bond Fund 12%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD U.S. Index Fund 4%</li> <li>TD Global Select Fund 5%</li> <li>TD International Equity Fund 6%</li> </ul>	<p><b>TD Managed Income</b></p> <ul style="list-style-type: none"> <li>TD Dividend Income Fund 12%</li> <li>TD Canadian Blue Chip Equity Fund 7%</li> <li>TD Canadian Bond Index Fund 15%</li> <li>TD Canadian Bond Fund 35%</li> <li>TD Short Term Bond Fund 9%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD U.S. Index Fund 5%</li> <li>TD Global Select Fund 6%</li> <li>TD International Equity Fund 7%</li> </ul>
<p><b>TD Managed Income &amp; Moderate Growth</b> 20-26 points</p> <ul style="list-style-type: none"> <li>TD Dividend Growth Fund 10%</li> <li>TD Canadian Blue Chip Equity Fund 10%</li> <li>TD Canadian Bond Index Fund 10%</li> <li>TD Canadian Bond Fund 33%</li> <li>TD Short Term Bond Fund 9%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD U.S. Index Fund 8%</li> <li>TD Global Select Fund 7%</li> <li>TD International Equity Fund 9%</li> </ul>	<p><b>TD Managed Income &amp; Moderate Growth</b></p> <ul style="list-style-type: none"> <li>TD Canadian Equity Fund 5%</li> <li>TD Dividend Income Fund 10%</li> <li>TD Canadian Blue Chip Equity Fund 9%</li> <li>TD Canadian Bond Index Fund 5%</li> <li>TD Short Term Bond Fund 7%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD U.S. Index Fund 8%</li> <li>TD Global Select Fund 10%</li> <li>TD International Equity Fund 9%</li> </ul>
<p><b>TD Managed Balanced Growth</b> 27-34 points</p> <ul style="list-style-type: none"> <li>TD Canadian Equity Fund 7%</li> <li>TD Dividend Growth Fund 8%</li> <li>TD Canadian Blue Chip Equity Fund 9%</li> <li>TD Canadian Bond Index Fund 2%</li> <li>TD Canadian Bond Fund 28%</li> <li>TD Short Term Bond Fund 5%</li> <li>TD U.S. Blue Chip Equity Fund 7%</li> <li>TD U.S. RSP Index Fund 6%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD Global RSP Bond Fund 3%</li> <li>TD International RSP Index Fund 4%</li> <li>TD International Equity Fund 9%</li> </ul>	<p><b>TD Managed Balanced Growth</b></p> <ul style="list-style-type: none"> <li>TD Canadian Equity Fund 7%</li> <li>TD Dividend Income Fund 12%</li> <li>TD Canadian Blue Chip Equity Fund 9%</li> <li>TD Canadian Bond Fund 25%</li> <li>TD Short Term Bond Fund 5%</li> <li>TD U.S. Blue Chip Equity Fund 5%</li> <li>TD U.S. Equity Fund 4%</li> <li>TD U.S. Index Fund 8%</li> <li>TD Global Select Fund 12%</li> <li>TD International Equity Fund 13%</li> </ul>
<p><b>TD Managed Aggressive Growth</b> 35-42 points</p> <ul style="list-style-type: none"> <li>TD Canadian Value Fund 5%</li> <li>TD Canadian Small-Cap Equity Fund 3%</li> <li>TD Canadian Equity Fund 8%</li> <li>TD Canadian Blue Chip Equity Fund 10%</li> <li>TD Canadian Bond Fund 20%</li> <li>TD U.S. Mid-Cap Growth Fund 5%</li> <li>TD U.S. Blue Chip Equity Fund 7%</li> <li>TD U.S. RSP Index Fund 16%</li> <li>TD International Growth Fund 5%</li> <li>TD International RSP Index Fund 10%</li> </ul>	<p><b>TD Managed Aggressive Growth</b></p> <ul style="list-style-type: none"> <li>TD Canadian Value Fund 7%</li> <li>TD Canadian Small-Cap Equity Fund 3%</li> <li>TD Canadian Equity Fund 7%</li> <li>TD Canadian Blue Chip Equity Fund 9%</li> <li>TD Canadian Bond Fund 20%</li> <li>TD U.S. Mid-Cap Growth Fund 5%</li> <li>TD U.S. Blue Chip Equity Fund 8%</li> <li>TD U.S. Index Fund 11%</li> <li>TD International Growth Fund 5%</li> <li>TD Global Select Fund 13%</li> <li>TD International Equity Fund 12%</li> </ul>
<p><b>TD Managed Maximum Equity Growth</b> 43-48 points</p> <ul style="list-style-type: none"> <li>TD Canadian Small-Cap Equity Fund 4%</li> <li>TD Canadian Equity Fund 9%</li> <li>TD Canadian Blue Chip Equity Fund 10%</li> <li>TD Health Sciences Fund 3%</li> <li>TD Science &amp; Technology Fund 3%</li> <li>TD U.S. Mid-Cap Growth Fund 6%</li> <li>TD U.S. RSP Index Fund 24%</li> <li>TD U.S. Blue Chip Equity Fund 6%</li> <li>TD International Growth Fund 5%</li> <li>TD International RSP Index Fund 18%</li> </ul>	<p><b>TD Managed Maximum Equity Growth</b></p> <ul style="list-style-type: none"> <li>TD Canadian Small-Cap Equity Fund 4%</li> <li>TD Canadian Equity Fund 8%</li> <li>TD Canadian Blue Chip Equity Fund 10%</li> <li>TD Health Sciences Fund 3%</li> <li>TD Science &amp; Technology Fund 3%</li> <li>TD U.S. Mid-Cap Growth Fund 6%</li> <li>TD U.S. Index Fund 10%</li> <li>TD U.S. Blue Chip Equity Fund 12%</li> <li>TD International Growth Fund 7%</li> <li>TD International Equity Fund 15%</li> </ul>

† In addition, TD Managed Index and TD FundSmart® Managed Portfolios are also available.

◇ Initial investment for TD MAP RESP portfolios is \$100.





## Investment Services

To comply with new federal regulations, TD Investment Services Inc. has added the following requirements to its account opening procedures:

1. TD Mutual Funds account applications submitted online or by mail must be accompanied by a personalized cheque for the bank or financial institution account that will be used to contribute money to your TD Mutual Funds account. If a cheque to purchase mutual funds in your account will not accompany your application, please enclose a void personalized cheque for the account that you will be using.
2. The following question must be answered before a TD Mutual Funds account is opened.

“Will someone other than the account holder be making frequent deposits to or receive financial benefit from the account?”

- No       Yes (Please complete the attached Third Party Statement)

---

Print Applicant Name

---

Applicant Signature

---

Print Co-Applicant Name  
(if applicable)

---

Co-Applicant Signature  
(if applicable)

Account Name: \_\_\_\_\_

Branch and Account #: \_\_\_\_\_

Name of Branch/Department/Division: \_\_\_\_\_

*A 'Third Party' is defined as anyone other than The Toronto-Dominion Bank (or any of its affiliates) or the account holder. (Employees depositing into their employer's account are not considered third parties.)*

For an account(s) that is to be used by or on behalf of a third party, please complete the following:

Third Party's Name	Third Party's Address	Third Party's Principal Business or Occupation *	Relationship to Account Holder

If additional space is required, please use the back of this form.

\* If the third party is a business, document the business' incorporation number and its place of issuance (if applicable).

Please have the customer sign the following:

**Confirmation:**

I, \_\_\_\_\_ (Account Holder), having signing authority over the account noted above confirm that above noted account will be used by or on behalf of the person(s) listed above. If this changes, I will advise The Toronto-Dominion Bank (and/or any of its affiliates) in writing immediately.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date



## Investment Services

- Please complete all Sections. Refer to the descriptions of each Section for assistance.
- Sign and initial all the appropriate areas. All applicants must:
  - Initial Section 9
  - Initial Section 10
  - Sign Section 11
- Forward your completed and signed application to:

**TD Investment Services  
Liberty Centre  
3500 Steeles Ave. E  
Tower 3, Level 1  
Markham, ON  
L3R 0X1**

If you require further assistance, please call TD Canada Trust EasyLine at 1-866-567-8888 and speak to one of our TD Mutual Funds Representatives or email us at [td.mutualfunds@td.com](mailto:td.mutualfunds@td.com).