

# CLAIMANT STATEMENT SUPPLEMENT FOR CANOE EL PROTECTION PORTFOLIOS CONTRACTS

This supplement must be completed when making a claim on a non-registered investment contract.

## 1.0 Claim Details

Contract number(s)	
First name of deceased	Last name
First name of claimant	Last name or exact name of corporation/entity
Claimant's occupation	

## 2.0 Dual Process to verify the identity of the claimant (the person completing this form)

Please enter the information requested in the Source section and **submit the documents listed** when sending in this Claimant Statement Supplement.

Provide documents from TWO different, reliable sources of information (Source 1, Source 2 and/or Source 3). To be reliable, the issuer of the document must be a trustworthy source of information.

We will accept an original version of the documents or a fax, photocopy, scan or electronic image of the original documents. Each document must be current, valid, legible and authentic and the two documents cannot be from the same issuer.

<b>SOURCE 1:</b>	<ul style="list-style-type: none"> <li>• Canadian utility bill</li> <li>• Canadian government issued property tax assessment</li> <li>• Canadian government issued vehicle registration</li> <li>• Canadian government issued benefits statements</li> <li>• Canadian government issued photo ID</li> <li>• Canada Revenue Agency documents such as notices of assessment</li> <li>• Canadian T4 statements, Record of Employment, or investment account statements such as RRSPs and GICs</li> </ul>
<b>SOURCE 2:</b>	<ul style="list-style-type: none"> <li>• Canadian government issued:</li> <li>• photo ID* (drivers license, passport or an equivalent ID card)</li> <li>• permanent resident card or citizenship certificate</li> <li>• original birth certificate or marriage certificate</li> <li>• divorce documentation</li> <li>• CPP statement of contributions</li> <li>• product from a Canadian credit bureau (containing two trade lines in existence for at least 6 months), Canadian credit file that has been in existence for at least 6 months, or insurance documents (home, auto, life)</li> <li>• travel visa issued by a foreign government</li> </ul> <p><b>*Health card is not an acceptable form of photo identification.</b></p>
<b>SOURCE 3:</b>	<ul style="list-style-type: none"> <li>• a credit card or bank statement</li> <li>• a mortgage statement</li> <li>• a letter from the financial entity holding a deposit account, credit card or loan account</li> </ul>

Source and document type (e.g. Source 1-utility bill)	Individual's name as shown on the document	Account/reference number

A copy of the documents listed must be submitted with this Claimant Statement Supplement.

