



15 York Street, 2nd Floor Toronto, ON M5J 0A3 Canada Phone: 1.877.310.1088 Fax: 416.288.8611

Letter of Direction - Estate Account

To: CI Direct Trading,

Please accept this letter of direction as our formal request to

We hereby agree to indemnify and hold CI Direct Trading, its nominees, directors, officers and employees harmless against and from any and all losses, damages and reasonable costs and expenses which may incur or suffer in carrying out the instruction.

Account Holder Name: _____ Account Holder Name: _____

Account Number: _____ Account Number: _____

Beneficiary Name: _____ Beneficiary Name: _____

Signature: _____ Signature: _____

Date: _____ Date: _____

Witness name: _____

(Witness cannot be related to any parties to the account holder or beneficiary)

Signature: _____

Date: _____

**CI Financial Corp. Privacy Office
Canadian
Subsequent Collection Form Standard Privacy Notice**

CI Investment Services Inc. also doing business under the registered trade name of CI Direct Trading ("CIIS", "we", "our", "us") requires personal information to administer and provide services associated with your account ("Account Services"). We use the personal information collected on this form to provide the products and services you have requested, improve our products and services, and fulfill our legal and regulatory obligations. Additional privacy terms apply to use of our online services and certain other services. We are not responsible for Third Party Providers such as your financial advisor and their dealership, who process personal information in accordance with their own terms. We share your personal information with CI Financial company affiliates and their subsidiaries where necessary to administer and service your account. You have the right to request access to or correction of, or withdraw your consent to the processing of, your personal information. For more information, including with respect to our use of service providers outside of Canada or your province of residence, please contact our Privacy Officer or see the CIIS's Privacy Policy at <https://www.cifinancial.com/ci-is/ca/en/privacy.html>.