

Employer Name				
Member's Statement (please print)				
Last Name	First Name	Middle Initial		
Social Insurance Number				
Type of Plan				
Registered	Non-Registered	Savings	Prism Wealth	Individual Retirement Plan
Investment Option - Self Directed				
<p>I CONFIRM THAT I FULFILL THE DEFINITION OF A "SOPHISTICATED INVESTOR" IN THAT I OR MY INDEPENDENT ADVISORS HAVE SUFFICIENT EXPERIENCE AND KNOWLEDGE OF THE FINANCIAL MARKETS TO BE ABLE TO EVALUATE A PARTICULAR INVESTMENT ON ITS MERITS. I UNDERSTAND THE RISKS INVOLVED IN SELECTING THIS OPTION, AM ABLE TO BEAR THE ECONOMIC RISKS THERE UNDER AND HAVE DETERMINED THAT THIS OPTION IS SUITABLE AND APPROPRIATE FOR ME. I ACCEPT FULL RESPONSIBILITY FOR MY SELECTION AND THE CONSEQUENCES OF MY DECISION.</p> <p><b>Please check one of the boxes below.</b> (If you do not make a selection, 1(a) will be the default.)</p> <p>1. a. Rebalance my account now and annually on January 1 in accordance with the allocation below.</p> <p>b. Rebalance my existing account now in accordance with the allocation below but then do not rebalance my account unless requested in writing.</p> <p>2. (APPLICABLE FOR EXISTING MEMBERS ONLY) - This election is for my future contributions only, please do not rebalance my account unless requested in writing.</p>				

Guaranteed Account	Allocation %	Equity Funds - Europe/UK	Allocation %
Interest Accumulator - 1 Year		Fidelity European Growth Fund	
Interest Accumulator - 5 Year		Fidelity European Smaller Companies Fund	
<b>Argus Select Funds</b>		Russell Continental European Equity Fund	
Conservative Fund		Vanguard European Stock Index Fund	
Moderate Fund		<b>Equity Funds - Global</b>	
Balanced Fund		Fidelity International Fund	
Growth Fund		Orbis Global Equity Fund	
Aggressive Fund		Russell World Equity Fund	
<b>Fixed Income Funds</b>		Vanguard Global Stock Index Fund	
Blackrock BGF USD Core Bond Fund		Vanguard Global Small Cap Index Fund	
PIMCO Investment Grade Credit Fund		<b>Equity Funds - Asia/Emerging Markets</b>	
Russell Global Bond Fund		Fidelity Asia Focus Fund	
<b>Equity Funds USA</b>		Orbis Japan Equity (USD) Fund	
Russell US Small Cap Equity Fund		Orbis Emerging Markets Equity Fund	
Russell US Equity Fund		Russell Japan Equity Fund	
Vanguard US 500 Index Fund		Russell Emerging Markets Equity Fund	
		Vanguard Japan Stock Index Fund	
		<b>Alternative Fund</b>	
		Orbis Optimal (USD) Fund	
<b>TOTAL (must total 100%)</b>			<b>%</b>
NOTE 1: Allocating 100% to ONE fund is NOT recommended			
NOTE 2: Minimum 10% in any fund			
NOTE: Argus Pensions trades weekly on a Friday. The investment into the above funds will be made on the next available dealing date for that particular fund. This form is to be sent to pensionsqueries@argus.bm by Wednesday for a Friday execution.			
I understand that the value of mutual funds units will fluctuate depending on the market value of the underlying securities held by that fund. Neither the capital value units nor the rate of return is guaranteed except for the Guaranteed Account. I also understand that Argus Pensions has the right to add or replace any of the funds listed above and to reinvest the value of any eliminated fund in the fund(s) selected by Argus Pensions as a replacement. I understand that there is no assurance that the investment objectives of the above investment options, or any of the underlying offerings, will be achieved. I confirm, that I have made independent decisions as to the underlying offerings under the investment options above and further acknowledge that I am not relying on any communication (written or oral) provided by the Employer (if applicable), Argus Wealth Management, Bermuda Life Insurance Company Limited or Argus Pensions as investment advice or a recommendation to invest in said investment options and underlying offerings.			

Member Signature

Date (MM/DD/YY)

PLEASE SEND COMPLETED FORM TO ARGUS PENSIONS VIA FAX (441) 296-7920 OR EMAIL [PENSIONSQUERIES@ARGUS.BM](mailto:PENSIONSQUERIES@ARGUS.BM)