

Form #	Form Name	Division	What's Changed
31	Third Party Information	Both	Phone number now required. Political Positions questionnaire added.
355	Payout Annuity Application	S&R	Political Positions section wording updates Verification of ID wording and document changes Declaration of Tax wording updates
594	Business Information	Both	New documentation required for Corporate owners. New Entity classification of "strata corporation".
671 OC	Ownership Change	Both	Alt ID changes. New 'Tax Considerations' section New 'Source of Funds' section
682 TC	Claimant's Statement – Term and CI	Ind	Claimant's Statement has been split into three forms due to new requirements on Whole Life and UL policies
682 WU	Claimant's Statement – Whole Life and UL	Ind	New 'Declaration of Tax Residence' section required under certain circumstances. Political Positions questionnaire added. ID Verification now required.
682 ENT	Claimant's Statement – Entities	Ind	Combination of 682WU and 594 to obtain the information required to identify an Entity.
693SEL	Investment Direction Form	S&R	Updates to the Political Positions section
693ANN	Investment Direction Form	S&R	Updates to the Political Positions section
799	GIA Reg/Non-reg Application	S&R	Political Positions section wording updates along with Verification of ID wording and document changes to Third Party section wording updates and Declaration of Tax wording updates
1027	Additional/Updated Customer Information	Both	Alt ID changes.
1384	Pivotal Select Application Form	S&R	Verification of ID has been updated along with Third-Party and Declaration of Tax section. Fund Selection has also been updated to include a reference sheet with all the funds.
1383	TFSA Application Form	S&R	Verification of ID has been updated along with Third-Party and Declaration of Tax section. Fund Selection has also been updated to include a reference sheet with all the funds.
1516	Claimant's Statement – Individuals	S&R	Beneficiary and Trustee information has been updated. Political Positions questionnaire also added.
1616	Application for Term Conversion	Ind	New 'Source of Funds' section Alt ID changes. Political Positions questionnaire added.
1710	Verification of Identity for Policy Owner(s)	Ind	Alt ID changes. Video call option added.
1733A	Non face-to-face and Alternative ID Verification	Both	Alt ID changes.
1820	Verification of ID (Remote Signer)	S&R	Verification of ID wording and document changes
1957	Client Information Form – Individual	Both	New form to request updated Owner details.
1959	Client Information Form – Entities	Both	New form to request updated Owner details when the policy is owned by an Entity
XX	Claimant's Statement – Entity	S&R	NEW