



1. New Life and/or A&S Agent Information

Full Legal Name [text box]

File Or Licence Number (If Other than a First Time Applicant): [text box]

This Form Represents:

Part of a Licence Application: [checkbox]

OR

Appointment of New Supervisor: [checkbox]

2. Applicant/Licensee Qualified Designations

I currently hold one of the following designations and am requesting a reduction in the 24 month supervision requirement under Council Rules:

Chartered Life Underwriter: [checkbox]

Certified Financial Planner: [checkbox]

Registered Financial Planner: [checkbox]

Please attach a copy of your designation. By signing below, you are confirming that your designation is current. If you have any questions as to whether your designation is current, please call the organization that granted the designation.

Note: If you do not have one of these designations – leave this section blank and proceed to number 3.

3. Signature

If I am appointing a new supervisor, I confirm that I have advised my existing supervisor on record with Council of this change. My supervisor is aware of and has consented to all other business activities I am engaged in, if any.

Applicant or Licensee: [text box]

Date signed: [DD][MM][YY]

4. Supervisor Declaration

I agree to supervise this Applicant / Licensee in accordance with Council Rules and publications. I understand my responsibilities, including the requirement to notify Council in writing within five (5) business days if I cease to act as the Applicant / Licensee's supervisor; and to include in the notification the reasons for withdrawing as supervisor if they relate to the person's suitability or conduct as a licensee.

5. Supervisor Information and Signature

Full Legal Name of Supervisor: [text box]

File or Licence Number: [text box]

Signature: [text box]

Date Signed: [DD][MM][YY]

Note: Any Supervisor seeking an exemption to the minimum five years' experience requirement must make a separate submission outlining his or her qualifications, including confirmation of licensed experience in another Canadian jurisdiction, if applicable. Once an exemption is granted, a Supervisor does not need to resubmit the request with subsequent Supervisory Undertakings.