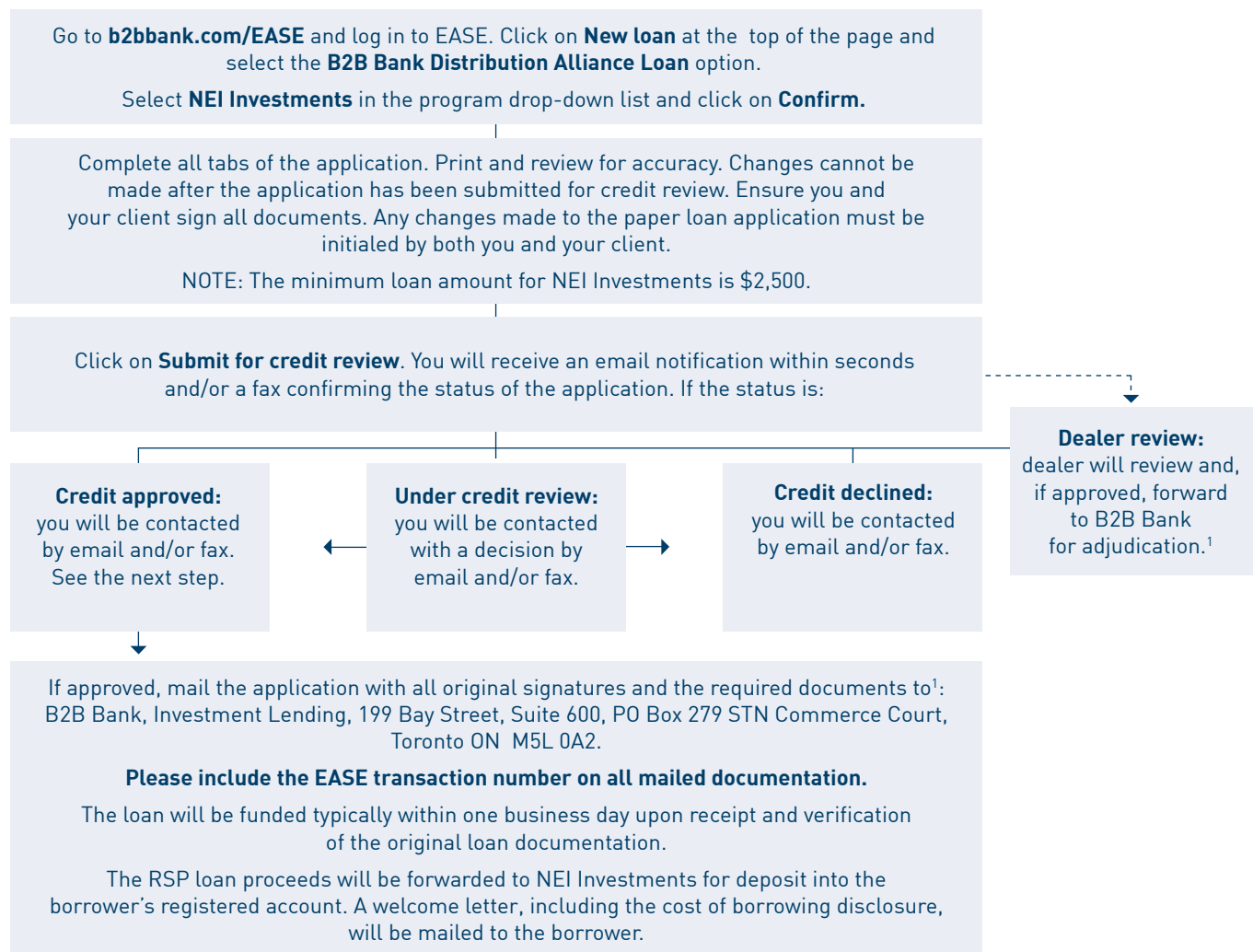


## Application process for NEI Investments

At B2B Bank, we offer two easy ways to apply for an RSP loan: online using our Electronic Application Submission Entry (EASE) system or on paper, by mail. The following instructions will guide you through the loan application process for the purpose of funding your client's registered savings plan at NEI Investments.

### Apply online through EASE

The online loan application allows you to enter, save, print, and submit loan applications quickly and easily.



For current RSP lending interest rates, please visit **b2bbank.com**.



### Apply on paper by mail

To submit an application by mail, simply follow the steps outlined below.



### RSP loan documentation

Documentation	Required
Original, completed and signed <i>B2B Bank RSP Loan Application</i> <sup>2</sup>	For all RSP loan applications.
Void cheque from the client's personal account	For all RSP loan applications.
Proof of assets	Upon request.
Proof of income <sup>3</sup>	Required for registered savings plan loan amounts greater than the maximum RRSP deduction limit for the current year, <u>or</u> loans with a term longer than 2 years.
Salaried income — Recent pay stub or Notice of Assessment	
Commissioned income — Last two years' Notice of Assessment	
Self-employed income — Last two years' Notice of Assessment and Financial Statements	
Letter of Direction	If paying out another financial institution.

For more information, call **1.800.263.8349** or visit **b2bbank.com**.

<sup>1</sup>Some dealers may request an initial review of all documentation. <sup>2</sup>Contact NEI Investments for more instructions on how to access the application from their website. <sup>3</sup>Additional documentation may be requested at the discretion of B2B Bank. B2B Bank is not affiliated with Northwest & Ethical Investments L.P. and does not endorse nor promote the investment products offered by Northwest & Ethical Investments L.P. B2B Bank does not provide investment advice to individuals or advisors. The dealer and advisor, not B2B Bank, are responsible for determining the suitability of investments for their clients and for informing them of the risks associated with borrowing to invest. B2B Bank acts solely in the capacity of lender and loan account administrator. Any loan approval from B2B Bank should not be construed as an endorsement of any investment choice, program or strategy. All loans are subject to credit approval and borrowed monies are due and payable regardless of the performance of the investments purchased. B2B Bank reserves the right to request additional information or documentation at its sole discretion. The B2B Bank RSP Loan Program is available exclusively through licensed financial advisors. Northwest Funds and Ethical Funds are divisions of Northwest & Ethical Investments L.P. Northwest Funds, Ethical Funds and NEI Investments are registered marks and trademarks owned by Northwest & Ethical Investments L.P. <sup>4</sup>B2B BANK is a registered trademark of B2B Bank.