

Customer Update



We encourage you to read over the form below, fill it out and return it to us. Keeping us up-to-date on your circumstances makes it that much easier for us to help you reassess, adjust and fine-tune your plan if necessary.

Contact Information

| | SUBSCRIBER 1 | SUBSCRIBER 2 |
|----------------|--------------|--------------|
| FIRST NAME | | |
| LAST NAME | | |
| HOME ADDRESS | | |
| POSTAL CODE | | |
| HOME PHONE | | |
| CELL PHONE | | |
| EMAIL | | |
| AGREEMENT(S) # | | |

Life Changes

Have you experienced any of the following life changes in the last two years?

- Job change Retired Major purchase (i.e. house, cottage, car)
 Marriage/divorce New child Other (please specify) _____

Investment Profile

Understanding your investment profile as it relates to your Registered Education Savings Plan (RESP) is important to us. Please complete the following questions:

The financial objective for this investment is to save money for your child's post-secondary education.

- Does this best describe your objective for your plan? Yes No

Our plans are designed for investors who are looking for a low level of volatility within their investments and are willing to accept lower returns for greater safety of capital.

- Does this best describe your understanding of this investment? Yes No

Investment Time Horizon

Determining the time horizon of your RESP is important. The time horizon for this investment aligns with when you anticipate your child(ren) will begin post-secondary education. This is referred to as the Maturity Date on your Family Plan Statement of Account. If you need to change the Maturity Date of your plan(s), please indicate the relevant Agreement number(s) below, and we will contact you regarding this change.

Agreement #: _____ Agreement #: _____ Agreement #: _____

Financial Profile

Keeping your financial information current is important so that we can ensure your RESP(s) are aligned with your financial situation.

What is your current gross family income? < \$15,000 \$15,000-\$25,000 \$25,000-\$35,000 \$35,000-\$50,000
 \$50,000-\$70,000 \$70,000-\$100,000 > \$100,000

What is your current net worth? (total assets minus total liabilities) < \$15,000 \$15,000-\$35,000 \$35,001-\$50,000 \$50,001-\$70,000
 \$70,001-\$100,000 \$100,001-\$250,000 >\$250,000

How many dependants do you have? 1 2 3 4 5 6+

Subscriber 1 Signature: _____

Date: _____

Subscriber 2 Signature (if applicable): _____

Date: _____

Please mail the completed form to: Knowledge First Financial
50 Burnhamthorpe Road West, Suite 1000
Mississauga, Ontario L5B 4A5