

Table - Features of the annuity

- All parts with * are mandatory to fill for all types of annuities.
- Other sections must be filled only if needed/applicable.

Type of annuity *	Choose an option
Annuitant name	
Annuitant sex *	
Annuitant date of birth (YYYY-MM-DD) *	
Co-annuitant name	
Co-annuitant sex (mandatory if joint annuity)	
Co-annuitant date of birth (mandatory if joint annuity, YYYY-MM-DD)	
Purchase date (today by default, YYYY-MM-DD) *	
First payment date (YYYY-MM-DD) *	
Annuity payment frequency (monthly by default)	
Amount of Single Premium OR desired Annuity Payments *	
Tax rate for illustration on page 2 (20% by default)	
% of commission (100% by default)	
Advisor's name and Distribution Channel *	

FYI:

- Administrative questions should be directed to savings@dfs.ca.
- Information regarding the validity of the quotation is on page 4.
- More information on Responsible annuities can be found on [WEBI](#).
- The guarantee is always the **cash refund**¹ option.
- If **Joint-Life annuity** is chosen, the **reversibility will always be 100%**.
- For single-life annuities, if the annuitant dies before the start of the first payment, the single premium will be completely refunded. If joint-life, it will be at the last death between the annuitant and co-annuitant.

¹Cash refund:

An option that allows the beneficiary to receive, upon the death of the annuitant, the difference between the single premium paid by the policyholder when subscribing to their annuity and the total of the payments that the annuitant has received before his death.