



**AGF Investments Inc.**  
 CIBC SQUARE, Tower One  
 81 Bay Street, Suite 4000  
 Toronto, ON M5J 0G1

Toll Free: 1 800 268-8583  
 Fax: 1 888 329-4243

# AGF Account Linking Agreement Form

One or more investors of AGF securities may link together their accounts into one AGF Household ("Household") for the benefit of reduced management fees. The Household definition criteria is provided below. To qualify for preferred pricing, the Household must have an aggregate book value or market value of \$250,000 or more to be invested in eligible funds/series. To learn more about AGF's preferred pricing solutions, visit Resources/Preferred Pricing at AGF.com.

## Defining your household

**Accounts linked to a Household must meet one of the following conditions:**

- Belong to the same individual
- Belong to spouses or other family members residing at the same address
- Be a corporate account, where one or more of the individuals in the Household has a combined ownership of at least 50% voting equity. Please attach copies of associated corporate resolutions and articles of incorporation.

**AGF will automatically link accounts with the same account holder SIN. For joint accounts, at least one owner's SIN must match in order to be auto-linked.**

## Authorization

**By signing this Form, the advisor:**

- (i) represents that the advisor has full authority and consent from all members of the Household to instruct AGF Investments Inc. to remove, modify and/or add accounts/members to the Household (based on eligibility), from time to time, by completing this Form.
- (ii) represents that the advisor (a) has obtained consent from their clients, in accordance with applicable law (including applicable privacy legislation), to disclose information (including personal data) to AGF Investments Inc. so that AGF Investments Inc. can provide certain services; and (b) is providing instructions to AGF Investments Inc. in accordance with all applicable laws.
- (iii) acknowledges that calculations of the tiered management fee rates will be applied upon receipt of this Form, in good order, by AGF Investments Inc. Any modifications made to the Household (i.e., removing or adding accounts/members) may affect the management fee rates that are to be applied.
- (iv) acknowledges that the advisor is responsible for any modifications, removals or additions of accounts belonging to the Household. AGF Investments Inc. will only automatically link any accounts where the SIN of at least one account owner is the same.
- (v) acknowledges that it is the responsibility of the advisor to ensure that this Form is completed correctly and all accounts listed meet the Household definition. Any errors in submissions are the responsibility of the advisor.
- (vi) acknowledges that AGF Investments Inc. has the authority to retroactively charge the client the correct management fee rates if errors in submissions are found, with equal monetary penalties to the advisor.
- (vii) acknowledges that the terms and conditions in this Form are in addition to those set out in the applicable simplified prospectus, annual information form and fund facts, and in the event of a conflict between those documents and this Form, those documents shall prevail.

## Managing your household

In the table below, please indicate the accounts you wish to add to a new Household, or to add/remove from an existing Household. Please note that it can take up to 5 business days for account linking / de-linking to take effect.

Account Information	Action required
<input type="checkbox"/> Check here if the changes apply to a pre-existing Household – provide reference account #: _____	
_____ Account number (for new accounts, indicate wire order number)	_____ Name of account holder
<input type="checkbox"/> Add account to this Household <input type="checkbox"/> Delete account from this Household	
_____ Account number (for new accounts, indicate wire order number)	_____ Name of account holder
<input type="checkbox"/> Add account to this Household <input type="checkbox"/> Delete account from this Household	
_____ Account number (for new accounts, indicate wire order number)	_____ Name of account holder
<input type="checkbox"/> Add account to this Household <input type="checkbox"/> Delete account from this Household	

Advisor Signature (mandatory) \_\_\_\_\_ Dealer Rep Code \_\_\_\_\_ Date \_\_\_\_\_  
 Dealer Signature (optional) \_\_\_\_\_ Dealer Number \_\_\_\_\_ Date \_\_\_\_\_

