

**Section 1 – To Be Completed By Dealer Firm**

Dealer Name	Dealer/Rep Code	Foresters Asset Management Inc. Sales Director	
Advisor Name	Date/Time of Event		
Telephone ( ) ( )	Fax ( ) ( )	Date D D / M M / Y Y	Advisor e-mail

This marketing request is for:  Sales Communication  Investor Seminar  Educational Course/Seminar  Trade Show  Dealer Conference

**Section 2 – Program Description:** Please provide specific details and include sample scripts, tear sheets, invitations, agenda, itinerary, etc. where applicable.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Estimated Total Direct Cost \$ \_\_\_\_\_ Amount Requested \$ \_\_\_\_\_

**Section 3 – Other Fund Companies and Suppliers Being Approached**

Fund/Supplier Name	Amount \$

**Section 4 – Description of How Companies and Suppliers Will Be Identified** (*Logos, paid in part by, etc.*)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Section 5 – Certification**

We hereby certify that the expenses noted above are eligible for reimbursement under the standards outlined in National Instrument 81-105, Mutual Fund Sales Practices ("the National Instrument"). We further certify that the amounts claimed from all companies, in total, will not exceed the allowable limits outlined in the National Instrument.

Name of Sales Representative	<input checked="" type="checkbox"/>	Date
Signature		D D / M M / Y Y
Name of Branch Manager	<input checked="" type="checkbox"/>	Date
Signature		D D / M M / Y Y
Name of Dealer Compliance Officer	<input checked="" type="checkbox"/>	Date
Signature		D D / M M / Y Y

**Authorization/Approval by Foresters Asset Management Inc.**

I have reviewed and authorize the above request

Foresters Asset Management Inc. Co-op Department Name	<input checked="" type="checkbox"/>	Date
Signature		D D / M M / Y Y

Foresters Asset Management Inc. 1500-20 Adelaide Street East, Toronto, Ontario M5C 2T6  
For more information or to download our sales practices guidelines, please visit our website at [www.imaxxwealth.com](http://www.imaxxwealth.com)

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3 Copies Required: Foresters Asset Management Inc., Dealer, and Branch/Advisor