



GROW YOUR INVESTMENT PLAN

BUSINESS MEMBERSHIP INVESTOR AGREEMENT

Member Loan Investment Agreement for participation in a three-, five- or seven-year term plan.

Three year offers an annual interest of 3.0% until 2024, five year offers an annual interest of 4.0% until 2026, or seven year offers an annual interest rate of 5.5% until 2028.

Please indicate which term(s) you would like to invest your member loan in. Minimum investment per term is \$5,000. (Check box that applies):

- Three-year term: 3.0%-til-2024 Amount \$ _____ Seven-year term: 5.5%-til-2028 Amount \$ _____
- Five-year term: 4.0%-til-2026 Amount \$ _____

BUSINESS INFORMATION		
Full Business Legal Name:*		UFA Member #:*
Operating as: <small>If applicable</small>	Parent Company Name: <small>If applicable</small>	
Briefly describe your Business Operation:*		
DUNS #:*	Number of Employees:	Year Business Operations Commenced:
Business Address:*		
City / Town:	Prov / State:	Postal Code / Zip:
Billing Address: <small>If different than business</small>		
City / Town:	Prov / State:	Postal Code / Zip:
Primary Contact:*	Position / Title:*	Email Address:
Work Phone #:	Cell #:	Fax #:

OWNERSHIP INFORMATION					
Ownership Type:*	<input type="checkbox"/> Sole Proprietor	<input type="checkbox"/> Partnership	<input type="checkbox"/> Corporation	<input type="checkbox"/> Limited Partnership	Number of Owners:*
Name of Owner / Shareholder:	Title:	% Owned:	Director: <input type="checkbox"/> Yes		
Name of Owner / Shareholder:	Title:	% Owned:	Director: <input type="checkbox"/> Yes		
Name of Owner / Shareholder:	Title:	% Owned:	Director: <input type="checkbox"/> Yes		
Name of Owner / Shareholder:	Title:	% Owned:	Director: <input type="checkbox"/> Yes		
Name of Owner / Shareholder:	Title:	% Owned:	Director: <input type="checkbox"/> Yes		
		Total:			

In this section of the form, "You" and "Your" refer to the Applicant or Business Owner providing personal information.

MEMBER OWNER / SHAREHOLDER INFORMATION			
Full Legal Business Name:*		Operating As:	
First Name:*	Middle Name:	Last Name:*	
Social Insurance Number (SIN): <small>Optional</small>	Date of Birth:*\br/> <small>yyyy-mm-dd</small>	Mother's Maiden Name:*\br/> <small>For security purposes</small>	
Address:*			
City / Town:*	Prov / State:*	Postal Code:*	
Phone #:*	Phone #2:	Email Address:	
Occupation / Position:*		Your Ownership Percentage:*	
Are you either a Canadian citizen or permanent resident? <input type="checkbox"/> Yes <input type="checkbox"/> No			



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TERMS AND CONDITIONS

11. The named applicant(s) (individually and collectively referred to below as the “**Applicant**”) has/have submitted this agreement to invest with United Farmers of Alberta Co-operative Limited (“**UFA**”) in one of the term programs offered: three year at 3.0% annual interest until 2024, five year at 4.0% annual interest until 2026, or seven year at 5.5% annual interest until 2028, paid semi-annually.
2. The Applicant acknowledges, represents, and warrants that:
 - a. The Applicant holds a membership in UFA with a minimum \$5.00 membership share;
 - b. The Applicant is at least 18 years of age and a resident of Alberta; and
 - c. The Applicant’s account(s) with UFA are currently in good standing.
3. The Applicant acknowledges and agrees that:
 - a. The minimum member investment is \$5,000 or current total investment in principle only;
 - b. The Applicant grants consent for UFA to use the void cheque to set up electronic fund transfer payments for interest under the Investment Plan;
 - c. Simple interest on the Funds will be calculated daily and paid semi-annually by UFA;
 - d. Funds cannot be redeemed early except for compassionate reasons which are subject to approval by UFA’s Chief Corporate Affairs Officer;
 - e. UFA will notify members 90 days prior to the maturity, depending on their investment plan, with an option to roll their funds into a new program (if applicable) or to withdraw their principal. Members who do not provide notice about their participation in the new offer (if any) or their desire to withdraw their principal at least 30 days prior to maturity will automatically have their investment paid into their bank accounts on file;
 - f. The Funds are neither secured nor insured;
 - g. UFA will issue tax statements for interest earned in accordance with applicable tax laws. It is the Applicant’s responsibility to comply with tax law when filing income tax returns;
 - h. UFA will provide the Applicant with semi-annual investment statements;
 - i. UFA has the right to delay repayment of any amount owing to any member for as long as the board of directors of UFA determines that the repayment of any indebtedness would: (a) constitute a default under or breach of any credit or other finance facility of UFA; or (b) jeopardize the liquidity or solvency of UFA; or (c) impact UFA’s business needs.
 - j. All claims for monies due or to become due from UFA to the Applicant(s) pursuant to this Member Loan Investment Agreement shall be subject to deduction or set-off by UFA in the event of any unpaid debt, claim or counterclaim that may be asserted by UFA against the Applicant(s), whether arising out of this Member Loan Investment Agreement or any other purchase, member account balances or transactions with UFA, or upon any other legal grounds UFA may have.
 - k. This agreement is subject to the *United Farmers of Alberta Co-operative Limited Act, 1966* (as amended) and UFA’s by-laws.

Acknowledgement (please check the following)

- REQUIRED:** I have read the above and agree to the terms and conditions and warrant to the correctness of all information I have provided.
- REQUIRED:** I acknowledge that the Funds cannot be redeemed early except for compassionate reasons, which are subject to approval by UFA’s chief corporate affairs officer.
- REQUIRED:** Signature Applicant #1 _____ UFA Member # _____
- Signature Applicant #2 (IF APPLICABLE) _____
- Date signed _____
- For joint membership we require both signatures.

You can complete the Member Identification Verification at your local Farm & Ranch Supply Store or Petroleum Agency. If a Member cannot attend in person due to COVID-19, they can follow the UFA COVID-19 Know Your Client Process dated 2021.

All inquiries and correspondence relating to investment programs can be answered by calling us toll free at 1-877-258-4500, and selecting option 1 or email us at Customer.Support@UFA.com

A copy of this agreement will be returned to you with confirmation of your investment.

06-16-2021



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MEMBER IDENTIFICATION VERIFICATION

This Identification Verification section must be completed, verified and signed by a UFA representative at a UFA Farm & Ranch Supply store or UFA Petroleum Agency. Please record the particulars on one (1) piece of identification from the original document for the owner/signing authority. The identification must be a valid government-issued photo identification (eg. driver's license, passport or firearms license).

Name of Owner / Signing Authority:		UFA Member #
Type of Identification:	Reference or Account #:	
Place of Issue: Province / State & Country		Expiry Date:

In accordance with the Agency Agreement signed with UFA or as an employee of UFA, I have verified the identity of the member(s) by examining the original, unexpired identification document recorded herein.

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 UFA Representative Signature: UFA Representative: (Print Name) Location: Date: (YYYY-MM-DD)

Remittance information

Direct deposit: I agree to UFA depositing my semi-annual interest payments or withdrawals directly into my bank account and notifying me via e-mail.

Financial institution information

Please attach a VOID cheque with this application OR provide your banking information below to ensure that your payments are deposited into your bank account.

Bank name _____ Branch phone # _____

Branch address _____

Account information: Bank code# _____ Branch # _____ Account # _____