



Global HR
Frequently Asked Questions

Share Purchase Plan (SPP)

2023-05-04

Internal
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General Information

1. What is the Share Purchase Plan?

The Share Purchase Plan (SPP) of CGI Inc. and its subsidiaries was set up in February 1989 to allow its participants to become owners of CGI by purchasing CGI shares. To learn more about the Share Purchase Plan, watch this short [video](#).

2. Who is eligible to SPP?

All members of CGI and its subsidiaries, that hold a regular full or part-time position, are eligible to join the Plan as long as they are not on a period of unpaid leave. Please note that SPP is offered in most countries and eligibility criteria vary per country. Refer to your country's HR content on CGI's [Intranet](#) for more details.

3. How do I enroll in SPP?

Enrolling in SPP is simple. Please access the [SPP Enrollment Tool](#) and then follow the steps indicated. Once accepted, an email will be sent to your CGI email address to confirm your contribution selection. If you are a member in United Kingdom, please access the [Member Flexible Benefits System](#) to enroll in SPP or amend your current contribution.

4. How much can I contribute?

There are two types of contributions available*:

	Minimum	Maximum	Notes
Basic contribution <i>Matched by CGI</i>	0.5% of gross base salary	Please refer to your country's HR content on CGI's Intranet	Contributions can be made in increments of 0.5%.
Additional contribution <i>Not matched by CGI</i>	0.5% of gross base salary	10.0% of gross base salary	

*Contribution percentage and calculation may vary depending on country-specific legislation. Please refer to your country's HR content on CGI's [Intranet](#) for more information.

5. What is the CGI's contribution?

CGI and its subsidiaries match your basic contribution up to the maximum eligible percentage. There is no holding period and shares may be sold or transferred immediately. Refer to your country's HR content on CGI's [Intranet](#) for the maximum eligible basic percentage.

6. Are CGI's contributions a taxable benefit?

In most countries, the employer's contributions are a taxable benefit. According to your country of residence, related income taxes and social security contributions may be deducted at source from each pay or they will have to be declared in your annual tax return. The employer's contributions will be shown on your receipts issued by the Payroll service, if applicable.

Exceptions may apply in some countries and, if applicable, they will be specified in your country's HR content on CGI's Intranet.

7. How are the contributions calculated and deducted?

The contribution percentage (basic and additional) is applied to your gross base salary and the amount is deducted from the net pay (after all statutory deductions) in local currency on each pay cycle.

8. Can I amend or suspend my participation?

At any time, you may increase, decrease, or suspend your basic and/or additional contributions through the [SPP Enrolment Tool](#) which is accessible at all time for SPP contribution modifications. The changes will become effective depending on the date the change is processed by the Payroll service. Under no circumstances will the changes be applied retroactively.

If you are a member in United Kingdom, please access the [Member Flexible Benefits System](#) to amend your current contribution.

9. What happens if there is a change in salary or if no salary is received?

If there is a change in salary, the contribution amounts of the basic and/or additional contributions will be automatically modified, effective on the next pay period immediately following receipt of the notice of change in salary by your Payroll service. If a salary change is process retroactively, there won't be any contribution on the retroactive.

Regardless of the reason, when you don't receive a salary, your participation in the Plan is automatically suspended. Contributions will automatically restart once a pay is produced.

Information on the Plan Administrator

10. Who administers the Plan?

The Plan Administrator is Shareworks by Morgan Stanley, whose legal name is Solium Capital ULC.

11. How to contact the Administrator?

Shareworks is dedicated to providing you with full-service assistance. Shareworks' Participant Services Group is available to answer all your questions using the following methods:

- Search through the Shareworks [Support Center](#) for an answer
- If you are able to log in to your account, [chat with an agent](#) using the chat functionality.
- You can contact the Shareworks' Participant Services Group from Monday to Friday on market trading days (closed during Canadian and/or US statutory holidays) [by phone](#)*.

North America: Dial the toll-free number **1-877-380-7793**.

Québec: Dial the toll-free number **1-877-214-4763**.

Finland and Lithuania: Dial the number **1-403-515-3909**.

Other countries:

1. Dial the [AT&T Direct Toll-Free access code](#) for the country you are calling from. Wait for AT&T signal.
2. Dial the toll-free number: **800-871-3821**.

** Service provided for all countries 24 hours / 5 business days. You will need to consider North American (ET) hours for opening and closing of the call center on business days.*

12. When can I access my Shareworks account?

As a new participant, you will receive a welcome message from Shareworks to your CGI email address when your first shares will be deposited in your Shareworks account after the first pay period following your enrollment.

13. How do I activate my Shareworks account?

Use the activation link sent from **shareworks_notification@shareworks.com** to your CGI email address.

Email link: Click on the link provided in the email “Activate my account” within 60 days of being received. If you exceed the 60 days, you will need to contact Shareworks support center.

Verification step: Once you click the “Activate my account” link, you will be required to verify your identity. Shareworks is able to use your information for validation as it originates from CGI.

Password Setup: After you have correctly entered the verification information, you are required to enter new login password. You can also set a username to login with. If you do not wish to set a username at this time, you can leave it blank and set one later.

Account Created: Once you enter your new password, your account is created, and you are given your new Account number. At this point you can immediately access your account. You should then click on “Access my account now” in order to finalize the activation. You will need to enter the provided account number and new password.

14. What other steps are required to login to my Shareworks account for the first time?

Sign in to Shareworks using your username, or account number and your password. A series of verifications will be prompted for your review and consent:

Participant Terms and Conditions, Privacy Policy and eDelivery Consent: The first landing page will ask you to review the terms and conditions for Shareworks platform.

Personal verification information questions: As part of the security requirements, you will need to provide two personal verification questions and answers.

FACTA agreement: If you are an U.S. resident, the next step will bring you to complete the W-9 form. If you are resident from Germany or Australia, the next step will bring you to complete the W-8 Ben form. Any non-U.S. participant buying U.S. equity through an U.S. custodian is required to complete the W-8 Ben form. For more information, please refer to the below question [I am not an U.S. resident, why have I been asked to complete a W-8 Ben form?](#)

CRS Reporting: The Common Reporting Standard, commonly known as “CRS”, is an international regulation that aims at ensuring tax compliance across international jurisdictions. The goal of these reporting standards is to protect the integrity of participating jurisdictions’ respective tax systems. Shareworks is required by law to ask participants who opened an account to provide certain information to comply with CRS. For more information, please refer to the below question [Why have I been asked to certify for the Common Reporting Standard?](#)

Agreement for market data display services: Review and agree to the exchange agreement that entitles you to transact shares on the Toronto Stock Exchange and/or the New York Stock Exchange.

Professional Subscriber Status: Review definition of what is a professional subscriber status.

Consent to Electronic Delivery of Documents: Provide consent to receive electronic documents instead of postal mail.

Contact Details: Enter your personal phone number and/or personal email and click Save.

2-factors authentication: In order to be able to place a transaction, you will need to activate the 2-factors authentication. Use your company provided phone number in your CGI file (you can validate in the member service portal). Using a different phone number will block your account for 5 days for fraud verification. For more information, please refer to the question [How can I change my phone number?](#)

15. I am not an U.S. resident, why have I been asked to complete a W-8 Ben form?

W-8Ben Tax Certification Forms are Internal Revenue Service (IRS) forms which are used to confirm a person's taxpayer identification number (TIN) for a U.S. citizen or a person defined as a resident alien. Any non-U.S. participant buying U.S. equity through an U.S. custodian is required to complete the W-8 Ben form. You must therefore provide W-8 Ben form to establish that you are not a U.S. person. Failure to provide a W-8 Ben form when requested may lead to withholding at the foreign-person withholding rate of 30% or the backup withholding rate under the IRS.

16. Why have I been asked to certify for the Common Reporting Standard?

As a financial institution in Canada, Shareworks is required by law to ask participants who open an account to provide certain information to determine whether your details need to be reported to one of the relevant tax authorities.

Also, please note that participants will be prompted to re-certify if one of the following indicia are changed;

- Home or Mailing address country change
- Home phone number or cell phone country code change
- Change or addition of Tax Identifier
- Banking information change (country where bank account is domiciled)
- Name changes
- Change to date of birth information

If you do not complete this certification, you will not be able to access your Shareworks account and will cause you to not be able to transact.

17. What is the Taxpayer identification number ("TIN")?

A taxpayer identification number ("TIN") is a unique identifier made of letters or number that the jurisdiction assigns to an individual. The jurisdiction uses the TIN in administrating its tax laws to identify the individual. For more details about TIN for each jurisdiction, please visit the [Organization for Economic Co-operation and Development \("OECD"\) website](#).

If you do not have a TIN, please check the TIN unavailable box and provide a reason you are not providing a TIN.

18. How do I login subsequently to my Shareworks account?

Sign in to Shareworks at: <https://cgi.solium.com/> using your username, or account number and your newly created password.

19. What do I do if I forgot my account password?

Simply click the [Forgot Your Password](#) link on the login page and complete the required steps.

20. How do I change my password?

To change your password when you are logged into Shareworks, click on your name in the top right corner, select **View Profile**, and then click on the **Change Login Password** link.

21. How can I set up the 2-factors authentication?

As a first-time user, a QR code will appear in your Shareworks activation page. If you encounter issues or if you want to set up the 2-factors authentication at a later time, a new QR code can be provided by Shareworks. You can contact Shareworks to request a new QR code if needed. Please refer to [How to contact the Plan Administrator?](#) for their contact information.

22. What do I do if my account is locked?

If your account is locked, you must contact Shareworks. You will then have to answer certain security questions to have it unlocked. Please refer to [How to contact the Plan Administrator?](#) for their contact information.

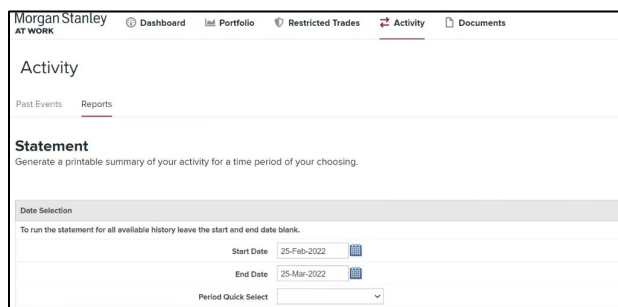
23. How can I get access to the Shareworks application on my mobile device?

You will need to download the “Shareworks, Morgan Stanley at Work” application on your mobile device and use your Account Number or Username and Password to sign in for the first time. Once you have signed in, you can set up fingerprint authentication using the Settings tab on the device.



24. Will I get an account statement which is showing the shares and transactions?

The statements are available online and can be run at any time, for any period, by clicking on the tab **Activity** and then select **Reports**. Enter the dates you require and select the option to view the statement or save/print via pdf.



Purchasing Shares

25. Which types of shares are purchased?

Shares are bought on the open market, either on the Toronto Stock Exchange (TSX) for members in Canada or the New York Stock Exchange (NYSE) for members in other countries. All participants who hold at least one CGI share have a voting right. For more information, refer to the **Investors** section on www.cgi.com.

26. When and at what price are shares purchased?

The shares are purchased at the open market value on the Toronto Stock Exchange (TSX) for members in Canada and the NYSE for all other countries. All purchases are grouped together and a weighted average purchase price is calculated for all of the shares. If the share price does not allow for a complete number of shares to be purchased, any fractions of shares are attributed to your account. All shares purchased during a said period are shown with an entry in your account; typically, one to two weeks following the pay period.

27. When can I see the shares that have been purchased in my account?

All shares purchased during a said period are shown with an entry in your account on settlement date. A settlement date is defined as the date a trade is settled, usually two days after the trade was done. However, please note that if you want to see the shares that may have been purchased but are not yet settled, you can view them by generating a statement with a future end date. For more information on statement, please refer to the question [Will I get an account statement which is showing the shares and transactions?](#).

28. What is the difference between the contribution date and the purchase date?

Payroll schedule of your business unit determines when the deductions from your pay will be processed. Then, local payroll provides to the Plan Administrator with contributions at each pay period. The contribution date in your account corresponds to each pay period.

Shares are then purchased following the remittance of contributions to the Plan Administrator. Lines in your account will be added with the share price and the number of shares purchased.

Here is an example. The contribution date is June 30, 2022. Settlement date of the shares purchased is July 6, 2022.

30-Jun-2022	Contribution	Employee
30-Jun-2022	Contribution	Employer
06-Jul-2022	You bought	Employer
06-Jul-2022	You bought	Employee

Withdrawing Shares

29. How can I withdraw shares?

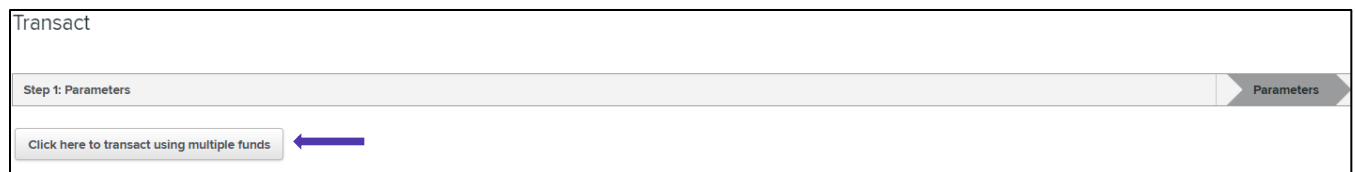
You may withdraw all or some of the shares, at any time.

Transaction can be done on the Shareworks platform or by calling the Shareworks' Participant Services Group. If you decide to do your transaction online, you need to click on the **Portfolio tab**.

On the **Share Purchase and Holdings tab**, locate the **"Sell or transfer"** beside the plan details. Click the link to begin the online withdrawal process. Follow the withdrawal process described below.

1) If you want to transact using multiple funds / accounts

Click on the button [Click here to transact using multiple funds](#).



The screenshot shows a web interface titled "Transact". Below the title is a horizontal bar with "Step 1: Parameters" on the left and "Parameters" on the right. Below this bar is a button labeled "Click here to transact using multiple funds". A blue arrow points from the right towards this button.

2) Select the type of transaction

In the Transaction Type box, select [Real Time Withdrawal](#) to sell shares or [Shares Withdrawal](#) to transfer shares to a personal brokerage account. Place mouse pointer over selection to see its full definition.

3) Select how many shares you wish to withdraw

Specify the number of shares you wish to withdraw.

4) Specify the market or limit order for a sale

Shares can be sold immediately at [current market rates](#) or at [a limit price that can be set for up to 30 days](#). Place mouse pointer over selection to see its full definition

5) Choose the delivery method to receive your proceeds or shares, choices include:

- **Proceeds from sale**

⇒ **Direct Deposit** (available in Australia, Canada, United Kingdom and United States)

The money is transferred to your bank account by direct deposit.

⇒ **SEPA**

The SEPA transfer is a payment transaction in euros. It is intended for the execution of funds transfers between payment accounts in banks located in the SEPA area.

⇒ **Wire Transfer**

The money is deposited electronically in your bank account.

⇒ **Cheque** (available in Canada or United States only)

A cheque is sent by postal mail to your home address.

- **Share Transfer**

⇒ **Electronic transfer to broker**

You can choose to have your shares transferred electronically to your personal brokerage account. Participants outside of North America must have a broker who has a counterparty broker in North America who will be able to accept the shares on their behalf for a transfer to be completed successfully. The selected broker must be able to accept TRAX transfer requests.

6) Verify withdrawal details and complete the withdrawal.

Your withdrawal will be summarized and displayed on the screen. Enter your transaction password and click the online disclaimer box to Submit your online withdrawal. You will receive a confirmation of your withdrawal and a reference number for your records. The withdrawal will be displayed in the **Transaction History** section of your account.

NOTE: It is extremely important to enter your financial information accurately because EFT/ACH transactions do not have tracking numbers, and if a transaction is rejected by a bank, there may be a delay of 5 to 10 business days before the funds can be re-issued.

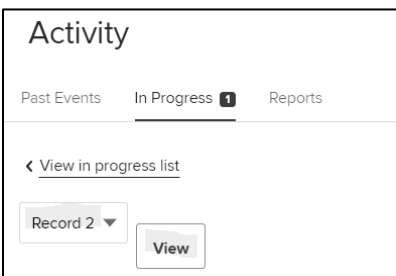
Wired funds can be easily tracked if there are any issues with your financial information. Net proceeds are typically credited to your bank account shortly after the settlement date of your transaction.

If the banking information you have provided is incorrect, the direct deposit or wire will be rejected by the bank. As soon as Shareworks receives the rejection, you will receive a notification. Shareworks will need to wait for your bank to send back the funds. Once the funds have been sent back, a representative from Shareworks' call center will call you and send an email. As soon, as Shareworks receives the updated banking details from you, the transaction will be re-issued.

If you use the currency conversion offered by the Plan Administrator, please note that the exchange rate is set by the Plan Administrator's bankers. An estimate will be provided to you before proceeding with the final transaction. The actual exchange rate to be applied to the conversion of your funds to the local currency will be determined after the transactions have settled. Foreign currency exchange rates depend on the current market, the value of the transaction and the bank rates. The rates may fluctuate from time to time and from transaction to transaction.

30. Where can I see the status of a transaction?

You will be able to see the status of a transaction in the Activity tab of your account. Some transactions may actually be split into two records (one employee and one employer). You can view the employer part (ER) by selecting "Record 2" and clicking on "View".



31. Can I complete a transaction by phone with Shareworks?

Shareworks can fully support transactions for you over the telephone and they are able to assist with many requests as well. These are the preferred channels for seeking assistance, as their representatives can assist you to the best of their ability.

32. How can I add or modify my banking information?

Before initiating your sale transaction, it will be important to update your banking details. To do so, follow the below steps:

NOTE: Update of banking information will trigger the 2-factors authentication (2FA).

1. Sign in to your Shareworks account.
2. Click your name on the top right. Click **View Profile**.
3. Under the Financial Institution Information section, select **Manage Banking Information**.



4. Click Add or Edit Banking Information. Make your desired updates or edits.
5. Shareworks will need to verify that the edits are requested by you. To do that, select how you would like to receive the verification code.
6. Enter the verification code once you receive it, and click Save.

33. How can I add or modify my personal brokerage account information?

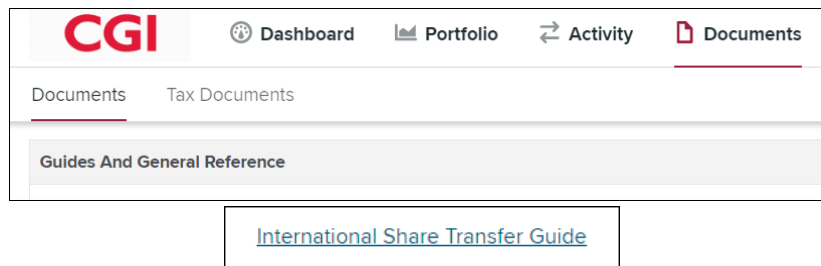
Before initiating a share transfer, it will be important to update your brokerage account information. To do so, follow the below steps:

NOTE: Update of brokerage account information will trigger the 2-factors authentication (2FA).

1. Sign in to your Shareworks account.
2. Click your name on the top right. Click **View Profile**.
3. Under the Financial Institution Information section, select **Manage Brokerage Account Information**.
4. Click Add or Edit Brokerage Account. Make your desired updates or edits.

5. Shareworks will need to verify that the edits are requested by you. To do that, select how you would like to receive the verification code.
6. Enter the verification code once you receive it, and click Save.

In order to facilitate the transfer when shares need to go from one country to another country (i.e. shares traded on the NYSE being transferred to a participant's brokerage account for example in Germany), you can download the document **International Share Transfer Guide** available in the Documents section of your Shareworks account.



34. If I hold a Direct Registration Statement from Computershare, what can I do to get the shares?

If you hold a Direct Registration Statement (DRS) from a withdrawal made on your SPP with Computershare, you will be required to contact CGI's Transfer Agent (Computershare) since the DRS is not available online. To transfer your shares from your DRS to a personal brokerage account, you will be required to have a brokerage account that will accept DRS.

You can contact the transfer agent using the toll-free number for shareholder services at 1-800-564-6253 or use their [website](#).

Fees

35. Who pays for the Plan's related fees?

All fees related to the administration of the Program are paid by CGI.

Banks/Financial institutions

CGI is not responsible for additional fees charged by **your personal financial institution or broker**; you are responsible for these fees. It is your responsibility to inquire about such fees before performing transactions.

Personal Information in my Account

36. How can I change my personal address?

All changes of address are sent to Shareworks by CGI. Therefore, it is important that you change your personal addresses in the [HR Service Center](#). If you are no longer a CGI employee, you must contact Shareworks to change a personal address. Refer to the question [How to contact the Administrator?](#) for more information.

37. How can I change my phone number?

All changes for phone numbers are sent to Shareworks by CGI. Therefore, it is important that you change your personal phone number including the country code in the [HR Service Center](#). Please add your phone numbers in the "Home" or "Cell" sections in your profile with the country code included. If you are no longer a CGI employee, you must contact Shareworks to change a phone number. Refer to the question [How to contact the Administrator?](#) for more information.

38. How can I add my personal email address in my account?

You can add your personal email address on your account along with other contact information. To do this in Shareworks, click on your name in the right-hand corner, select **View Profile**, then click **Personal Profile**.

Past Plan Administrators

39. What will happen to my Computershare account?

Computershare portal is accessible in “read only” until May 31st, 2023. You are able to retrieve statements and tax slips by visiting the section “MY ACCOUNT” and then by clicking “Print Statements Online” section of your account. It is strongly recommended that you download and print all statements, tax receipts and forms from Computershare’s portal that could be needed in the future. These have not been migrated from Computershare to new share plan administrator. The Computershare portal will be accessible until May 31st, 2023 to do so.

You can also call Computershare (in Montreal) at 514-982-7666 for general inquiries. Please note that this is not an AT&T number, and hence, you will have to call their general line. Overseas callers should verify with their local phone provider how to enable their phone to call Computershare Contact Center, as well as for any fees charged for the call.

40. What should I do if I sold shares with Computershare and I still haven’t received the sale proceeds?

You will need to call Computershare to inquire on the cheque/wire status. If the cheque is not received, you will need to request for stop payment on the cheque and request for a replacement by international wire transfer. Your banking information needs to be provided to Computershare for an international wire replacement.

Computershare can be reached out by dialing 514-982-7666. Please note that this is not an AT&T number, and hence, you will have to call their general line. Only Computershare will be able to assist you as CGI does not have access to Computershare’s accounts since migration.

Overseas callers should verify with their local phone provider how to enable their phone to call Computershare Contact Center (in Montreal) at 514-982-7666, as well as for any fees charged for the call.

For any cheque replacement requests, participants should call the Computershare Contact Center in Montreal. Computershare does not accept email requests for cheque replacements.

41. How to get a statement from Sun Life Financial?

The acquisition date and the adjusted basis of the stock acquired with the previous Plan Administrator (Sun Life Financial) are indicated on the account statements that you were invited to download upon the Plan Administrator change back in March 2015. Participants who did not download Sun Life statements can get them by contacting Sun Life’s call center to request the statements that you wish to obtain.

Sun Life will confirm the cost and will require that a cheque in Canadian dollars covering the fees be sent to them along with a note including your CGI member ID and your social security number. Following reception of payment, they will send the requested account statements.

Sun Life Financial Phone number: 1-866-733-8612

Sun Life Financial Mailing Address: 1155 Metcalfe Street, suite 660, Montreal, Quebec, Canada, H3B 2V9

Fees: CAD 20.00 per statement, payable by cheque to Sun Life Financial.

Tax Implications

42. How do I calculate the capital gain or loss at time of sale of shares?

It is your responsibility to establish the capital gain or loss. In order to establish the capital gain or loss for a given transaction, you must obtain the average cost (purchase price) and the market value of the shares. This information is found on your statement. You may also obtain this information by contacting Shareworks. Refer to the question [How to contact the Administrator?](#) for more information.

Also, if CGI shares are held through another brokerage account, the value of these shares must also be taken into consideration to establish the capital gain or loss.

Exceptions may apply in some countries and, if applicable, they will be specified in your country's HR content on CGI's Intranet.

Tax laws may change frequently and differ from one country to another. You must consider the present document as a guide, and not as a tax advice. CGI cannot give advice or be responsible for your tax position. CGI strongly advises you to seek professional advice if you have any doubt about your position.

Termination of Employment

43. Do I need to do anything before leaving CGI?

Before leaving CGI, we strongly recommend to add your personal email address in your CGI member account using the self-service functionality of the member portal. As the CGI email address will no longer be supported upon termination, refer to the question [How can I add my personal email address in my account?](#)

It is also strongly recommended that you print a statement and tax forms from Shareworks portal that you might need in the future.

44. What will happen to my SPP if I leave CGI?

You must wait until your final contribution has been allocated to your Shareworks account before closing it, typically between 2 and 6 weeks after your final salary payment is received. You must close your account as soon as the last contributions are allocated into the account by selling or transferring all shares held in the account. Please refer to the question [How can I withdraw shares?](#) for more information.

Upon notification of the termination of employment, Shareworks will post an electronic notification in your Shareworks account to confirm how to close the account. If no instruction is provided from you within allocated time, Shareworks will proceed with the closing of the account and will sell your shares.

Before closing the account, it is recommended that you print all statements and forms that could be needed in the future for tax declaration purpose.

It is your responsibility to ensure that Shareworks has the correct home and email address on file. Refer to the section [Personal Information in my Account](#) for the change of personal home and email address.

Contact Us

- ↪ For questions regarding the Program, create a case in the [HR Service Center](#), send an email to globalhrss@cgi.com or call HR Participant Services at one of the [toll-free numbers](#).
- ↪ For questions regarding your Shareworks account, contact the Plan Administrator. Refer to the question [How to contact the Administrator?](#) for more information.

General Provisions

- ↪ This document is only a summary of the Plan and is provided for guidance only. The participant can consult the complete text of the Plan available on CGI's Intranet and in the event of any dispute, the Plan text takes precedence.
- ↪ Information provided within the Plan documents does not constitute any legal or tax advice. Participants should seek appropriate independent advice in relation to their own situation.
- ↪ Participants in countries that are part of the European Economic Area (EEA) should refer to Employee Share Purchase Plan Information Document available to view in the SPP Enrolment Tool before taking an investment decision.

