



Designation of Beneficiary

- RETIREMENT SAVINGS PLAN
- RETIREMENT INCOME FUND

Annuitant's Name (Surname first and at least one Given Name)

Member Number

Select One:

- First Designation (Add)
- Changing or Removing Designation (Update)

Contract Number

Pension Lock-in?

- Y -Yes
- N - No

I, _____, of _____, in the Province of _____, the annuitant under the above contract referred to above, do hereby declare that:

- a) I hereby revoke any prior Designation of Beneficiary made by me under this contract.
- b) The beneficiary(s) designated herein must survive me and accept this designation in order to receive benefits payable under this contract. If more than one beneficiary is entitled to receive benefits, they shall share the proceeds equally. The Alternate Beneficiary designation is valid only in the event that all the Primary Beneficiaries listed herein have predeceased me or refused the designation. If no beneficiary designated herein survives me or accepts this designation, the proceeds of this contract shall be paid to my estate.
- c) All sums falling due under this contract, on or after my death, be paid to the Beneficiary(s) listed below.

PRIMARY BENEFICIARY

Note: If RRIF Contract: Where the **sole** primary beneficiary is my spouse, this designation also stands as a **Successor Annuitant** appointment, whereby the original RRIF contract continues in my spouse's name.

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

ALTERNATE BENEFICIARY(S) Optional

Valid only in the event that all the primary beneficiaries listed above predecease me or refuse the above appointment.

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

Name: _____ Relationship: _____

Address: _____ SIN: _____ Minor (Y/N) _____

- CAUTION:**
- 1) Your designation of beneficiary by means of a designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation.
 - 2) If funds contained in this contract are subject to pension legislation, the addendum governing such funds may override this designation if a person other than your spouse (or other individual who has been given similar rights under the applicable pension jurisdiction) is designated to receive the proceeds.
 - 3) Your estate may be responsible for reporting and paying income tax on proceeds paid to a designated beneficiary.

Date

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Day

Month

Year

Witness (Should not be a beneficiary or relative of annuitant)

Annuitant's Signature

Received By: _____ Approved By: _____ Entered By: _____ Date: _____