Registered Plan Beneficiary & Contingency Beneficiary Designation Form

199 Bay Street, Suite 2600, Toronto, ON, M5L 1E2, Canada

Phone: 1.877.310.1088 Fax: 416.288.8611

Account number:	

A	ccount type:
THIS FORM CANNOT BE COMPLETED ELECTRONICALLY AND MUST BE RECEIVED IN HARD COPY WITH ORIGINAL SIGNAL	TURES.
NOT FOR USE BY PERSONS DOMICILED IN THE PROVINCE OF QUEBEC.	
Account Holder/Annuitant Information	

					Ma	ndatory	
	☐ Mrs				Mandatory		
	Last name First name & initials			<b>;</b>	Social Insurance Number (mm/dd/yyyy)		
Home Address		Ap	ot.	Birth Date			
City		Province	Postal Code	Home Phone Numl	ber	Business Phone Number	
his Bei egistei equired	neficiary & Beneficiary Contingency red Plan. (Provide only one account f.)	Beneficiary Designation Form is number. Should you wish to de	s to apply to the above identified signate beneficiaries and conting	registered plan (the "Registered P ency beneficiaries for more than o	lan") and will apply to one account, a sepai	o all assets held under the rate form for each account is	
sign	nation of Beneficiary						
nd I a omeo orm, w ne cas nd he	stand that I am solely responsil m familiar with the contents the ne other than your spouse as be will make such transfer or pase may be), benefits will be paid reby designate the following as	reof. In most provinces, pe eneficiary, pension legislat yment of their portion to yo in equal shares unless yo	ension legislation requires be ion may override this design our legal personal representa u specify otherwise below. I	nefits from a pension plan to ation. If a beneficiary(ies) die ative. If you appoint more than hereby revoke any previous I	be paid to your see before you unlessen one beneficiary	pouse. If you have named s otherwise specified on this (or contingent beneficiary, as	
١.	Name of beneficiary in full			Relationship to Accou	unt Holder		
	Address of Beneficiary			Social Insurance Nur	mber	Percentage Payable	
2.	Name of beneficiary in full			Relationship to Accou	unt Holder		
	Address of Beneficiary			Social Insurance Nur	nber	Percentage Payable	
3.	Name of beneficiary in full			Relationship to Accou	unt Holder		
	Address of Beneficiary			Social Insurance Nur	mber	Percentage Payable	
sign	nation of Contingent Be	eneficiary					
the a	above named Beneficiary is not	living at the time of my de	eath, I hereby designate the	following as <b>Contingent Ben</b>	<u>eficiary</u> :		
١.	Name of beneficiary in full			Relationship to Accord	unt Holder		
	Address of Beneficiary			Social Insurance Nur	mber	Percentage Payable	
2.	Name of beneficiary in full			Relationship to Accor	unt Holder		
	Address of Beneficiary			Social Insurance Nur	nber	Percentage Payable	
the a	above-named Contingent Benef	iciary is not living at the tin	ne of my death, the proceeds	s of the Plan will be paid to m	y estate.		
cou	nt Holder/Annuitant Si	gnature					
Dated	at	province of	_this_	day	of	_20	
	Account Hold	ler/Annuitant Signature					

## NOTES:

Authorized Signature of Agent

CAUTION: In some provinces, your designation of beneficiary (with the exception of a designation of a successor annuitant of a RRIF or a successor holder of a TFSA) by means of a designation form will not be revoked or changed automatically by any future marriage or divorce, or establishment or breakdown of a common -law partnership. If you wish to change your beneficiary, you will have to do so by means of a new designation.

Date

QUEBEC: Any beneficiary designations made using this form by a person domiciled in Quebec, either at the time of execution or at the time of their death, may not be honoured and the assets of the Registered Plan may be payable to the estate of the deceased.