



RETIREMENT SAVINGS PLAN Designation of Beneficiary

Client No.

Annuitant Name

(Surname first and at least one Given Name)

Contract No.

Pension Lock-In? Y, N

Select one:

First Designation (Add)

Changing or Removing Designation (Update)

Branch No.

I, _____, of _____, in the Province of _____,

_____ the annuitant under the RRSP Contract referred to above, do hereby declare that:

- a) I hereby revoke any prior Designation of Beneficiary made by me under this plan.
- b) The beneficiary(s) designated herein must survive me and accept this designation in order to receive benefits payable under this RRSP. 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 RRSP shall be paid to my estate.
- c) All sums falling due under this RRSP contract, on or after my death, be paid to the Beneficiary(s) listed below.

Primary Beneficiary(s): If more than one beneficiary appointed, they share equally *or* if one beneficiary is deceased, all funds go to surviving beneficiary.

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

In the event that the primary beneficiary(s) listed above predeceases me, I hereby declare that all sums falling due under this RRSP contract, on or after my death, be paid to:

Alternate Beneficiary(s): If more than one beneficiary appointed, they share equally *or* if one beneficiary is deceased, all funds go to surviving beneficiary.

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

Name: _____ Relationship: _____ Res (Y / N) _____

Address: _____ SIN: _____

- 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 a Pension Lock-In, the locking-in addendum governing such Pension Lock-In may override this designation if a person other than your "spouse" 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.

DD	MM	YY

Date

Witness

Planholder's Signature