



**Beneficiary Declaration – Designated  
RRSP, RRIF, TFSA**

This form should be completed when there is a Beneficiary Designation on file or in the will. Each beneficiary is required to complete a separate form.

**IN THE MATTER OF THE ESTATE**

**OF:** \_\_\_\_\_  
(Full Name of Deceased)

**LATE OF:** \_\_\_\_\_  
(City, Province)

**I,** \_\_\_\_\_, **of** \_\_\_\_\_, **do solemnly declare:**  
(Full Name of Beneficiary) (City, Province)

1. THAT I am the \_\_\_\_\_ of the deceased and that I have personal knowledge of all matters herein referred to. (Relation to the Deceased)
2. THAT the Deceased died on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, as proved by the **attached notarial/certified copy** of one of the following documents:
  - Death Certificate
  - Grant of Administration
  - Grant of Probate
  - Other \_\_\_\_\_
3. THAT the Deceased died:
  - Intestate
  - With a will dated \_\_\_\_\_ (dd/mm/yyyy) **a notarial/certified copy of which is attached hereto**, and the will is **(select one)**:
    - Not to be probated
    - To be probated/ already probated
4. THAT the Deceased appears on the records of League Savings and Mortgage as the holder of:
  - RRSP Contract No.(s) \_\_\_\_\_
  - RRIF Contract No.(s) \_\_\_\_\_
  - TFSA Contract No.(s) \_\_\_\_\_
5. THAT I am entitled to receive the proceeds as the named **(select one)**:
  - Beneficiary
  - Beneficiary and Successor Annuitant (RRIF)
  - Beneficiary and Successor Holder (TFSA)
6. THAT I claim the funds as a designated beneficiary under the above referenced RRSP/RRIF/TFSA contract(s) by
  - Designation on the appropriate application or change form
  - In the deceased's Will, **a notarial/certified copy of which is attached hereto**

and request that League Savings and Mortgage follow the directions on page 2 regarding the proceeds in which I am entitled.

7. THAT I have no knowledge of any facts or information which would have any adverse effect on the entitlement to the proceeds claimed herein.
8. THAT my permanent residential address is \_\_\_\_\_, and my SIN No. is \_\_\_\_\_
9. **I make this solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath and by virtue of the *Canada Evidence Act*.**

**To be completed  
by Administrator**  
\_\_\_\_\_ ID Checked

|  |  |
|--|--|
| <p><b>Declared</b> before me at _____, in the Province of _____</p> <p>this _____ day of _____, A.D., 2_____</p><br><br><p>_____</p> <p>A Commissioner for Oaths/Notary Public</p> | <p align="center">_____<br/>(Signature of Beneficiary)</p> |
|--|--|



Therefore, I request that my entitlement to the above investment(s) be:  
(Complete the applicable section per the contract(s) noted on page 1. Select only one bolded option in each applicable list)

RRSP

**Transferred in my name as**  RRSP **or**  RRIF (Spouse or Common-Law Partner Only)

A new contract with League Savings and Mortgage – attach Application and A115

An existing contract with League Savings and Mortgage - Contract # \_\_\_\_\_

**Transferred to a Financially Dependent Child/Grandchild**

Annuity  RRSP  RRIF Contract # \_\_\_\_\_

**Note: Please contact League Savings and Mortgage for additional forms and further direction.**

**Redeemed and paid to me** (Applicable to all Beneficiaries other than spouse or common-law partner)

Send cheque to: \_\_\_\_\_

\_\_\_\_\_

RRIF

**Continued as RRIF payments as the Designated Successor Annuitant** (Spouse or Common-Law Partner Only)

A new contract with League Savings and Mortgage – attach Application and A115

An existing contract with League Savings and Mortgage - Contract # \_\_\_\_\_

**Transferred in my name to** (Spouse or Common-Law Partner Only)

A new contract with League Savings and Mortgage – attach Application and A115

An existing contract with League Savings and Mortgage - Contract # \_\_\_\_\_

**Transferred to a Financially Dependent Child/Grandchild**

Annuity  RRSP  RRIF Contract # \_\_\_\_\_

**Note: Please contact League Savings and Mortgage for additional forms and further direction.**

**Redeemed and paid to me** (Applicable to all Beneficiaries other than Successor Annuitant)

Send cheque to: \_\_\_\_\_

\_\_\_\_\_

TFSA

**Transferred in my name as the Designated Successor Holder** (Spouse or Common-Law Partner)

A new contract with League Savings and Mortgage – attach Application and A115

An existing contract with League Savings and Mortgage - Contract # \_\_\_\_\_

**Redeemed and paid to me** (Applicable to all Beneficiaries other than Successor Holder)

Send cheque to: \_\_\_\_\_

\_\_\_\_\_