



**Claimant Declaration – No Beneficiary
RRSP, RRIF, TFSA**

This form should be completed when there is no Beneficiary Designation on file or in the will. If there are multiple claimants, each 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 Claimant) (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 (select one):
 - Intestate (A Grant of Administration may be required to release any funds on an undesignated file)
 - 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 I am authorized to receive the proceeds as the (select one): Executor **OR** Administrator of the Deceased's estate and the Deceased appears on the records of League Savings and Mortgage as the holder of the following accounts without a designated beneficiary (select all that apply):
 - RRSP Contract No.(s) _____
 - RRIF Contract No.(s) _____
 - TFSA Contract No.(s) _____
5. THAT I claim the funds under the above referenced RRSP/RRIF/TFSA contract(s) and request that League Savings and Mortgage follow the directions on page 2 regarding the proceeds.
6. THAT I have no knowledge of any facts or information which would have any adverse effect on the entitlement to the proceeds claimed herein.
7. THAT my permanent residential address is _____
 _____ (No.) (Street)

 (City, Province, Postal Code)

ID Checked _____ (Staff Initial)

8. **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*.**

<p>Declared before me at _____, in the Province of _____</p> <p>this _____ day of _____, A.D., 2_____</p> <p>_____</p> <p>A Commissioner for Oaths/Notary Public</p>	<p align="center">_____ (Signature of Claimant)</p>
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The Claimant Declaration – No Payout will be processed unless the following is attached:

- One of a certified copy of the Grant of Probate **OR** the Grant of Administration; **OR** alternatively, a sworn Declaration of Indemnification.

The proceeds of the account(s) will be redeemed and paid to the estate of the Deceased.

Note: Any personal information provided for the purpose of disposition of funds shall only be used for that sole purpose.

Send cheque to: _____

DECLARATION OF INDEMNIFICATION

This form should be completed when a claim is made without a Grant of Probate.

I, _____, of _____, do solemnly declare:
 (Claimant) (City, Province)

1. THAT I make this declaration as Executor/Administrator of the funds in the referenced RRSP/RRIF/TFSA contract(s) in the attached form.
2. THAT I make this declaration for the purpose of inducing League Savings and Mortgage to pay out to me the money standing to the credit of the deceased in League Savings and Mortgage (not exceeding \$_____), without a Grant of Probate or Grant of Administration first being obtained and produced.
3. THAT in consideration of League Savings and Mortgage paying to me the money standing to the credit of the deceased in League Savings and Mortgage (not exceeding \$_____) without Grant of Probate/Grant of Administration first being obtained and produced, I hereby for myself, my heirs, executors, administrators, successors and assigns release League Savings and Mortgage and agree to indemnify and save harmless and keep indemnified and saved harmless League Savings and Mortgage from all action, suits, causes of action, claims, and demands which are now or may at any time hereafter be made, brought or claimed against League Savings and Mortgage in respect of the monies paid to me and from all loss, costs, charges, and expenses which League Savings and Mortgage may sustain or be put in connection herewith or by any reason of payment of said monies to me.
4. THAT 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*.

<p>Declared before me at _____, in the Province of _____ this ____ day of _____, A.D., 2_____ _____ A Commissioner for Oaths/Notary Public</p>	<p>_____ (Signature of Claimant)</p>
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