



DESIGNATION OF BENEFICIARY

**RETIREMENT SAVINGS PLAN
RETIREMENT INCOME FUND**

TAX FREE SAVINGS ACCOUNT

Client No. Name _____
 RSP/RIF Annuitant
 TFSA Holder _____

Contract No.

Select one: First Designation Changing or Removing Designation

I, _____ of _____, in the Province of _____
 the annuitant/holder under the 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 unless otherwise specified below. 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 - If more than two primary beneficiaries, complete the addendum.

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

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

ALTERNATE BENEFICIARY(S) - If more than two alternate beneficiaries, complete the addendum.

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

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

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.
- 4) Designations are created and governed under provincial legislation. The provincial legislation may override this designation.

Date: _____ MM DD YEAR _____ Annuitant/Holder's Signature _____ Witness Signature
 (should not be a beneficiary or relative of annuitant)



RETIREMENT SAVINGS PLAN

TAX FREE SAVINGS ACCOUNT

RETIREMENT INCOME FUND

Client No.	<input type="text"/>	Name	_____
		RSP/RIF Annuitant	_____
		TFSA Holder	_____
Contract No.	<input type="text"/>		

This document is to be completed when adding additional primary or alternate beneficiaries and forms part of the Designation of Beneficiary form completed by me on _____

Date – (Month/Day/Year)

PRIMARY BENEFICIARY

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

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

ALTERNATE BENEFICIARY(S)

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

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

Name: _____ Relationship: _____

Address: _____

Date: _____
MM DD YEAR

Annuitant/Holder's Signature

Witness Signature
(should not be a beneficiary or relative of annuitant)