

### IN THE MATTER OF THE ESTATE

To be completed when there is a Designation of Beneficiary on the RRSP/RRIF/TFSA contract or in the Will or an Appointment of Successor Annuitant/Holder. Note: Not valid where deceased resided in Quebec.

OF: \_\_\_\_\_  
(full name of deceased)

LATE OF: \_\_\_\_\_  
(city, province)

**All parties signing this document must initial any changes or deletions.**

Common-law partner to complete Declaration by Common-law Partner.

I, \_\_\_\_\_, of \_\_\_\_\_,  
in the Province of \_\_\_\_\_, do hereby certify that I am the  
\_\_\_\_\_ of the deceased and that I have personal knowledge of all matters herein  
(relationship)  
referred to and DO SOLEMNLY DECLARE:

1. THAT the deceased died on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.
2. THAT the deceased appears on the records of \_\_\_\_\_ as the holder of:  
(organization name)

Contract number registered with CRA

- RRSP contract number(s) \_\_\_\_\_
- RRIF contract number(s) \_\_\_\_\_
- TFSA contract number(s) \_\_\_\_\_

3. THAT because I am named beneficiary/successor annuitant/successor holder under the above referenced RRSP/RRIF/TFSA contract(s) by:
  - designation/appointment on a prescribed form;
  - in the deceased's Will, a copy of which is attached hereto; or
  - spousal entitlement to locked-in RRSP/RRIF contract as per applicable provincial or Federal pension legislation

I am entitled to proceeds held in the above contract(s) and I claim the said funds as a designated beneficiary or successor annuitant/holder on the said contract or in the Will.

4. THAT my birth date is \_\_\_\_\_.
5. THAT my social insurance number is \_\_\_\_\_.
6. THAT my permanent residential address is \_\_\_\_\_.

7. THAT in consideration of the proceeds being paid or transferred to me, on behalf of myself and my heirs, executors and administrators, I do covenant and agree at all times to save harmless and keep indemnified Concentra/Concentra Trust together with any of its affiliates and subsidiaries, and \_\_\_\_\_ and their respective successors or assigns, from all actions, suits, or other claims or demands of any nature whatsoever and also from and against all costs, damages, interest and expenses which they may bear or incur for any reason or which may arise as a result of their paying or transferring the said proceeds to me and I hereby agree to execute on demand any further releases, indemnities or discharges required of me in this regard.  
(organization name)

THEREFORE, I request that my entitlement to the **RRSP** investments be distributed as follows:

- Transferred to:
- Spouse/common-law partner  RRSP  RRIF contract number \_\_\_\_\_  
(application attached for new contract)
  - Full transfer or  Specified dollar amount \$ \_\_\_\_\_
  - Impaired/financially dependent\* child/grandchild  Annuity  RRSP  RRIF contract number \_\_\_\_\_  
(application attached for new contract)
  - Full transfer or  Specified dollar amount \$ \_\_\_\_\_
  - Financially dependent\* child/grandchild  Annuity to age 18
  - Full transfer or  Specified dollar amount \$ \_\_\_\_\_

\*The personal representative sends a letter to the CRA to request an adjustment to the deceased's income for the year of death, for the amount being claimed as income by the designated beneficiary.

- Redeem and pay to me
- Direct Deposit → Route (Inst)  Transit  Account #   
(Void Cheque Attached)

\_\_\_\_\_  
(name and address of financial institution)

THEREFORE, I request my entitlement to the **RRIF** investments be distributed as follows:

Appointment of spouse/common-law partner as successor annuitant - continue RRIF in my name

Continue RRIF payments by  Cheque  EFT to account number \_\_\_\_\_ at \_\_\_\_\_  
(attach a void cheque) (organization name)

Designation of beneficiary

Spouse/common-law partner only (application attached for new contract)

Transferred to my name;  RRSP  RRIF contract number \_\_\_\_\_

Full transfer **or**  Specified dollar amount \$ \_\_\_\_\_ (application attached for new contract)

Impaired/financially dependent\* child/grandchild  Annuity  RRSP  RRIF contract number \_\_\_\_\_

Full transfer **or**  Specified dollar amount \$ \_\_\_\_\_

Financially dependent\* child/grandchild  Annuity to age 18

Full transfer **or**  Specified dollar amount \$ \_\_\_\_\_

*\*The personal representative sends a letter to the CRA to request an adjustment to the deceased's income for the year of death, for the amount being claimed as income by the designated beneficiary.*

Redeem and pay to me

Direct Deposit **→**  
(Void Cheque Attached)

Route (Inst)

Transit

Account #

\_\_\_\_\_  
(name and address of financial institution)

THEREFORE, I request my entitlement to the **TFSA** investments be distributed as follows:

Appointment of spouse/common-law partner as successor holder - continue TFSA in my name.

Designation of beneficiary

Spouse/common-law partner, only

Contributed to my TFSA contract number \_\_\_\_\_

NOTE: The spouse/common-law partner may be eligible for an exempt contribution of an amount not exceeding the fair market value of the TFSA at date of death. The exempt contribution must be made during the exempt period. The spouse/common-law partner must complete a RC240 *Designation of an Exempt Contribution Tax-Free Savings Account (TFSA)* and file same with CRA within 30 days of the contribution. Restrictions may apply where the spouse/common-law partner is a non-resident of Canada.

Redeem and pay to me

Direct Deposit **→**  
(Void Cheque Attached)

Route (Inst)

Transit

Account #

\_\_\_\_\_  
(name and address of financial institution)

Dated at \_\_\_\_\_

in the province of \_\_\_\_\_

this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

\_\_\_\_\_  
(name of beneficiary/successor annuitant/successor holder)

\_\_\_\_\_  
(signature of beneficiary/successor annuitant/successor holder)