



Designation of Beneficiary / Successor Annuitant and/or Contingent Beneficiary

Please scan and send the completed form to: support@wealthsimple.com

Account Type: RRSP / SRSP / LIRA / LIF / RRIF / SRIF ("Plan/Fund")

Annuitant's Name	Complete Account Number

In accordance with the Declaration of Trust of the Plan/Fund the undersigned revokes any beneficiary designation heretofore made in respect thereof and hereby designates the undermentioned as primary beneficiary designate of the proceeds payable under such Plan in the event of death of the undersigned. I assume responsibility for ensuring that this designation is valid under the laws of Canada and its Provinces and Territories as may be applicable. It is my sole responsibility to ensure that my designation is effective and changed when appropriate.

In the event of my death, I elect the individual(s) named below as primary beneficiary(ies) designate, if he/she/they survives me. (For RIF, SRIF or LIF Successor Annuitant Only: If "Relationship" is identified as "Spouse" below, I elect the payments continue to my spouse named below, if he or she survived me and is my spouse on the date of my death). If designating a successor annuitant, their SIN is required.

The undersigned wishes to designate a contingent beneficiary(ies) to receive any proceeds under this Plan/Fund if the primary beneficiary(ies) named below, should die before you. In that event, a contingent beneficiary(ies) listed below will automatically be entitled to the benefit that would have been payable to the primary beneficiary(ies).

Name of Beneficiary	Relationship	Address of Beneficiary (MUST include postal code, if applicable)	Type	Percent (each type must total 100%)	SIN (if applicable)
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		
			<input type="checkbox"/> Primary <input type="checkbox"/> Contingent		

If no percentage is stated above, or the Percentages of Entitlement do not add up to 100%, I direct that the proceeds of my Account be divided equally among the surviving beneficiaries or paid to the surviving beneficiary on my death, as the case may be. If any person identified as a contingent beneficiary predeceases me, I direct that their Percentage of Entitlement (as indicated above) be divided equally among the surviving beneficiaries or paid to the surviving beneficiary on my death, as the case may be. For greater certainty, the share of a deceased primary or contingent beneficiary will go in equal portions to the surviving beneficiary(ies), primary and/or contingent beneficiaries respectively. If none of the person(s) identified above survive me, I direct that the proceeds of my Account be paid to my estate on my death.

Caution Applicable to All Provinces Except Quebec: Your designation of beneficiary(ies) by means of a designation form of this document will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your beneficiary(ies) in the event of a future marriage or divorce, you will have to do so by means of a new designation.

Annuitant's Signature

Date