

Designation of Beneficiary / Successor Annuitant and/or Contingent Beneficiary for Registered Plans

Account Type: TFSA RRIF SRIF FHSA

Annuitant's Name:	Complete Account Number:
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Note to Annuitants residing in Quebec: Designation of a successor annuitant and/or beneficiary can be made only in a will.

Successor Annuitant: Only your spouse or common-law partner can be a successor annuitant. In the event of your death, they will take ownership of all assets in the account and operate the Account in their own name.

Beneficiary: In the event of your death, the beneficiary(ies) will receive the proceeds in the Account. In accordance with the Declaration of Trust of the Plan, I hereby revoke any previous beneficiary designation made in respect thereof and hereby designate the undermentioned as successor annuitant or beneficiary of the proceeds payable under such Plan in the event of my death. 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.

Successor Annuitant Designation		
	<input type="checkbox"/> Spouse <input type="checkbox"/> Common-Law	
Name of successor annuitant	Relationship to Annuitant (select one)	Social Insurance Number(Required)
Address (must include unit/house number, street name, city, province/state and postal code)		

If I have not elected a successor annuitant or if the successor annuitant does not survive me, I wish to designate the beneficiary(ies) stated below to receive any proceeds under this Plan. In the event that the primary beneficiary(ies) do not survive me, the contingent beneficiary(ies) listed below will automatically be entitled to the benefit that would have been payable to the primary beneficiary. If none of the person(s) identified as successor annuitant or beneficiary survive me, I direct that the proceeds of my Account be paid to my estate on my death.

Note: If a successor annuitant is designated, the person(s) below must be designated as a contingent beneficiary. Percentage entitlement for each beneficiary type must total to 100. An individual cannot be both a successor and beneficiary.

Beneficiary Designations					
Name of Beneficiary	Relationship to Annuitant	Address of Beneficiary (must include unit/house number, street name, city, province/state and postal code)	Type	Percentage Entitlement (% whole numbers only)	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		

x _____
Annuitant's Signature

Date