

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

Account/Plan Type:  RRSP  SRSP  GRSP  LIF  LIRA

**Annuitants's Name:** \_\_\_\_\_

**Complete Account Number:** \_\_\_\_\_

**Note to Annuitants residing in Quebec:** Designation of a successor annuitant and/or beneficiary can be made only in a will.

**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. 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 (For LIRA/LIF Accounts, please only add contingent beneficiary(ies))**

Name of Beneficiary	Relation To Annuitant	Address of Beneficiary (must include unit/house number, Street name, city/town, province/state, and postal/zip code)	Type	Percentage Entitlement (%) <b>Whole #'s only</b>	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		

**Caution:** Your designation of a beneficiary(ies) for this Plan will not be revoked or changed automatically as a result of any future marriage or common-law relationship or breakdown of marriage or common-law relationship. It will be your responsibility to revoke or change the designation.

**Minor Child:** Where a beneficiary is a minor child, it is the responsibility of the Plan holder to ensure that a trustee and/or a guardian of the minor child's property has been validly appointed under applicable provincial law.

**Annuitant's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_