



A: Account Information

Account Holder Last Name, First name, Init., Social Insurance Number, Home Telephone Number, Email Address, Account Number, Plan Number(s)

B: Address and Personal Information Update

Address Update:

NEW ADDRESS, City, Province, Postal Code

Personal Information Update:

Information Disclosure, Telephone Number, Email Address, Other:

Enter Updated Information Here:

C: Beneficiary Change I revoke any previous designation of beneficiary/successor holder with respect to my interest in my Plan.

RSP/Spousal RSP/LIRA

I designate the person named below as beneficiary of my Plan if that person is living at the date of my death. I reserve the right to revoke this designation.:

Name of Beneficiary: Relationship to Me: Initials of Annuitant

This designation may not be valid in all provinces. If the beneficiary is not living at the date of death, or in the absence of a designated beneficiary on this form or in your will, the proceeds of this Plan will be paid to your estate.

(For RIF, LIF or LRIF only, please check if applicable) I elect that my spouse continue to receive the payments as successor annuitant under the relevant Fund, provided the Fund is still active on my death or until the Fund ceases.

TFSA

A. Designation of successor holder (for all provinces and territories, except Quebec)

In the event of my death, I designate my spouse or common-law partner, by naming them below, to be the successor holder of the Plan. If I have designated both successor holder and beneficiary (under Designation of Beneficiary(ies) section below), and both are alive at my death, then the successor holder designation takes precedence. The successor holder may, after my death, revoke or change the beneficiary(ies)

Last Name, First Name, SIN

B. Designation of beneficiary(ies) (for all provinces and territories, except Quebec)

If I have designated my spouse as successor holder, the following beneficiary designation will be effective only if my successor holder predeceases me or is not my spouse or common-law partner on the date of my death. I designate the person(s) named below as the beneficiary(ies) under the Plan, provided this person(s) is living at the date of my death. If a beneficiary I have designated below dies before, then that beneficiary's percentage entitlement will be shared among any other beneficiary(ies) I have designated who survive me, in proportion to their percentage entitlement. If I do not designate any beneficiaries, payment will be made to my estate.

Last Name, First Name, Relationship, Allocation %

D: Certification

I certify that the information given on this form is correct.

Client Signature, Date