

Beneficiary designation form

Return completed form to:
Sun Life Financial, Group Retirement Services
PO Box 2025 Stn Waterloo, Waterloo ON N2J 0B4

Please PRINT clearly.

Nota : La version française de ce document est également disponible.

1 Plan and your personal information

Name of plan sponsor University of Northern British Columbia			Client ID C092R	Plan 01
First name	Middle initial	Last name		
Date of birth (dd-mm-yyyy)	Social insurance number *		Account number	
Email address	Telephone number (day)		Telephone number (evening)	

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

Complete the appropriate section to designate a beneficiary for your account.

If you have a spouse when you die, the law may stipulate that all or part of the death benefit be paid to your surviving spouse, unless where provided, the spouse waives the death benefit. A beneficiary designation other than your spouse would only apply to those death benefits which are not, according to the law, payable to your surviving spouse. If you wish to ensure that your spouse receives all benefits, please designate your spouse here. In the absence of a beneficiary designation, and if not payable to your spouse as prescribed by law, death benefits will be paid to your estate. It is important for you to ensure that you specify in your will to whom the death benefit should be paid.

To appoint a trustee for a beneficiary who is a minor, please complete the 'Appointment of trustee for a minor beneficiary' section. In Quebec, any amount payable to a minor beneficiary during his/her minority will be paid to the parent(s) or legal guardian on his/her behalf.

The following caution is required by Manitoba law. It may also be applicable in other jurisdictions.

Caution: Your designation of a beneficiary by means of a designation form will not be changed or revoked automatically by any future marriage or divorce. Should you wish to change or revoke your beneficiary in the event of a future marriage or divorce, you have to do so by means of a new designation.

2 Beneficiary designation – DCPP/SPP

Contract number 62354-G

I, the owner, revoke any previous beneficiary designations and name as beneficiary for benefits due on my death:

Beneficiary's first name	Middle initial	Last name	Relationship to you*	Percentage of benefits
				%
				%
				%

***Quebec:** if you name your spouse as beneficiary, please indicate if this person is your common-law spouse. Otherwise, we will deem this person to be your legal spouse.

Important: Where Quebec law applies, a **legal** (married or civil union) spouse beneficiary is **irrevocable** unless you indicate otherwise.

If you have an irrevocable beneficiary, you may not change your beneficiary designation and may not be able to withdraw/transfer your assets out of the plan unless you provide Sun Life Financial with the irrevocable beneficiary's written consent.

To avoid this restriction and make your beneficiary designation revocable, you must check here: Revocable Beneficiary

