

**1** **INFORMATION ON THE ANNUITANT/HOLDER OF THE ACCOUNT**  
First and last name of annuitant/holder

**2** **IDENTIFICATION OF ACCOUNT**  
The designation only applies to the SOLE account identified below. If you wish to make a designation for another account, you must complete a separate form.  
Plan account No.: \_\_\_\_\_ (enter one account No. only)  Apply to my USD\$ account as well  
Type of plan (TFSA, RRSP, RRIF, LIF, RLIF, LRIF, PRIF, LIRA, LRSP, etc.): \_\_\_\_\_

**3** **DESIGNATION OF A SURVIVING ANNUITANT/HOLDER (ALSO KNOWN AS SUCCESSOR ANNUITANT/HOLDER)**  
**Warning: The designation of a surviving annuitant/holder will not have the exact same effects as a beneficiary designation.**  
**RRIF (including LIF, LRIF, Prescribed RIF and Restricted LIF):** In accordance with the terms governing the registered retirement income fund hereinabove, in the event of my death, I elect to have the payments from this fund continue to be paid to my spouse or common-law partner, who will become the surviving annuitant within the meaning of Section 146.3 of the *Income Tax Act* (Canada).  
**TFSA:** In accordance with the terms governing the tax-free savings account hereinabove, I designate my spouse or common-law partner as surviving annuitant under the meaning of Section 146.2 of the *Income Tax Act* (Canada) and I transfer to him or her all the rights that I hold in this account, including the unconditional right to revoke any beneficiary designation made, or any similar order given regarding the account and/or the assets in this account.  
\_\_\_\_\_  
First and last name of the spouse or common-law partner

**4** **DESIGNATION OF BENEFICIARY**  
In accordance with the terms governing the Plan, I designate the following persons as beneficiaries of all proceeds payable under the Plan, on the condition that they are still alive on the date of my death.

**Primary Designation**

First and last name	Relationship to annuitant	% of distribution

**Contingent Designation (only applies if there are no surviving beneficiaries on the date of the annuitant's/holder's death)**

First and last name	Relationship to annuitant	% of distribution

**IMPORTANT: The same beneficiary cannot be designated as both the primary and contingent beneficiary.**

**5** **SIGNATURE OF ANNUITANT/HOLDER**  
I have read, understood and I accept the terms hereof and I revoke any surviving annuitant/holder and beneficiary designation made previously with respect to the Plan, including any related designation by will for such purpose.  
I acknowledge that the designation of a surviving annuitant/holder and/or beneficiary hereinabove has legal and tax consequences. I acknowledge that the Institution has not made any representations to me of a legal, fiscal or other nature related to such designation and I release the Institution from any liability in this respect.  
I acknowledge that I am solely responsible for checking that this designation is valid under the applicable legislation in my province (or territory) of residence, obtaining the relevant confirmations and making any appropriate changes in a timely manner.  
I release the Institution from any liability of any nature related to the validity, application and effect of this designation upon my death.  
\_\_\_\_\_  
Date (YYYY MM DD)      X  
Signature of annuitant/holder

**1**  
**Annuitant Identification**

- > Enter the name of the **account holder**.

**2**  
**Account Identification**

- > **Only one account** can be identified per form.
- > Indicate the **7-character** account number.
- > Check the "USD\$" box to apply a similar request to a USD\$ account of the same plan.
- > Only one of the plans mentioned in the question can be chosen.
- > **Note: A beneficiary cannot be designated** for a non-registered account, RESP and FHSA.

**3**  
**Designation of a Surviving Annuitant**

- > **Only** for an RRIF, LIF, PRIF, and TFSA account.

**4**  
**Designation of Beneficiary**

- > Complete the field for each beneficiary.
- > The sum for each category of designation must be 100%.

**5**  
**Signature & Sending Form**

- > A **signature** and **date** are mandatory.
- > **Electronic signature:** Must be sent via the secure [Message Centre](#) of the online brokerage platform.
- > **Handwritten signature:** Send by mail to the address indicated at the bottom of the form.