

15 York Street, 2nd Floor Toronto, ON M5J 0A3 Canada  
 Phone: 1.877.310.1088 Fax: 416.288.8611

**NOT FOR USE BY PERSONS DOMICILED IN THE PROVINCE OF QUEBEC.**

**Type of account**

<input type="checkbox"/> RRSP	<input type="checkbox"/> RRIF	<input type="checkbox"/> TFSA	<input type="checkbox"/> LIF	<input type="checkbox"/> RLSP
<input type="checkbox"/> LIRA	<input type="checkbox"/> PRIF	<input type="checkbox"/> LRIF	<input type="checkbox"/> RLIF	

**Account Holder Information**

<input type="checkbox"/> Mr.				
<input type="checkbox"/> Mrs.	_____	_____	_____	Mandatory
	Last name	First name & initials	Social Insurance Number	
			(mm/dd/yyyy)	
Home Address	Apt.		Birth Date	
City	Province	Postal Code	Home Phone Number	Business Phone Number

This beneficiary designation form is to apply to the above identified registered plan (the "Registered Plan") and will apply to all assets held under the Registered Plan. (Provide only one account number and check only one account type box. Should you wish to designate beneficiaries for more than one account, a separate form for each account is required.)

**Successor Annuitant / Designation of Beneficiary**

I understand that I am solely responsible for ensuring that the designation below is legally valid.  
 I have received a copy of the Declaration of Trust of the Registered Plan and I am familiar with the contents thereof.  
 I hereby revoke any previous designations of beneficiary made by me for this Registered Plan and, subject to the Notes set out below, I hereby: **(check one or both)**

elect to have my spouse or common-law partner, if he or she survives me and remains my spouse or common-law partner at the time of my death, become the successor annuitant of my RRIF or the successor holder of my TFSA, upon my death **(only applicable to RRIF and TFSA accounts):**

\_\_\_\_\_ Successor holder/beneficiary's Social Insurance Number

Name of successor holder/beneficiary in full \_\_\_\_\_

Address of successor holder / beneficiary \_\_\_\_\_

designate the person(s) named below, if then living, as beneficiary to receive the proceeds payable under the Registered Plan upon my death.

1.	_____	_____
	Name of beneficiary in full	Relationship to Account Holder
	_____	_____ %
	Social Insurance Number (required)	Percent Payable
2.	_____	_____
	Name of beneficiary in full	Relationship to Account Holder
	_____	_____ %
	Social Insurance Number (required)	Percent Payable
3.	_____	_____
	Name of beneficiary in full	Relationship to Account Holder
	_____	_____ %
	Social Insurance Number (required)	Percent Payable

Account Holder Initials \_\_\_\_\_ Agent Initials \_\_\_\_\_

**Account Holder's Signature**

Dated at \_\_\_\_\_ province of \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.


\_\_\_\_\_

Holder's Signature

\_\_\_\_\_  
 Name of Witness (print). Must not be related to Beneficiary

\_\_\_\_\_  
 Signature of Witness

**Accepted on behalf of Canadian Western Trust Company by its Agent, CI Investment Services Inc.**

  
 \_\_\_\_\_  
 Authorized Signature of Agent

\_\_\_\_\_  
 Date

**NOTES:**  
**CAUTION:** i) In certain provinces, a beneficiary designation or any revocation thereof may be made only by a will and accordingly a beneficiary designation made herein may not be valid. Your beneficiary designation may not automatically change as a result of your future marriage or marriage breakdown. ii) Electronic beneficiary designations may be accepted but may not be legally valid/enforceable/honoured, and if providing a beneficiary designation electronically you are strongly encouraged to also provide such beneficiary designation in ink. It is your sole responsibility to ensure that the beneficiary designation is effective and changed when appropriate.  
**QUEBEC:** Any beneficiary or successor annuitant/holder designations made using this form by a person domiciled in Quebec, either at the time of execution or at the time of their death, may not be honoured and the assets of the Registered Plan may be payable to the estate of the deceased.  
**SUCCESSOR vs. BENEFICIARY(IES):** If (i) you have designated both a successor annuitant/holder and one or more beneficiary(ies) above, (i) your designated successor annuitant/holder remains your spouse or common-law partner, and (iii) both are alive at your death, then the designation of a successor annuitant/holder takes precedence.  
**MULTIPLE BENEFICIARIES:** You must ensure that the percentage numbers you may fill in above total to 100 percent. If they do not, all listed beneficiaries will be deemed to have been designated with an equal percentage. If a beneficiary you have designated dies before you, that beneficiary's percentage entitlement will be paid to your estate.  
**GOVERNING LAW:** If you are domiciled in Canada when you die, this form will be governed by the laws of your province/territory of domicile at that time. If you are not, the laws of your Canadian province/territory of domicile at the time of execution of this form will apply. Otherwise, the laws of Ontario will apply.