

Change of beneficiary and Estate Planning

Beneva Investment Accounts, Beneva GICs and Beneva Equity Index GICs

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This form enables you to designate other parties to your contract, to add them or to modify the choices that you have made upon subscription, as appropriate.

Please complete only the sections in which you want to make or modify a designation.

The choices that you make may have an impact on your contract, should one of the parties therein die. Please contact your advisor for estate planning advice tailored to your personal needs. For more details, refer to your Savings and annuity contract (IND247).

tailored to your personal ne	eds. For more details, refer to yo	our Savings and	annuity contract (IND24)	7).						
A contingent Contractholde	r (subrogated in Quebec) cannot	be designated a	as a primary, continuing	or contingent ben	eficiary (subrogated in Quebec).					
1. Information Abo	ut the Contractholder	This informa	ation must be similar	to the informat	ion provided in the Application form.					
Last name			First name							
Last name			i iist name							
Last name of the co-Contractholder (if applicable)			First name							
Contract No:	if the change	concerns only o	∕ one plan.							
OR										
Investor No:	estor No: if you want to apply the change to all your plans.									
2. Estate planing										
TFSA - Contingent Con	tractholder (Subragated in	Quebec)								
	esignated. Upon the death of the e Contractholder of the arrangen				cholder's survivor acquires all of the designation made.					
Last name		First name			Social Insurance Number¹					
					Y Y Y Y M M D D					
Address (No.) (if address is different from Contactholder)		Street		Apt.	Date of Birth					
City			Province		Postal Code					
•					Sex: Female Male					
Telephone (home)	Telephone (work)	Extension	Email		Language:					
Used for taxation purposes only										
3. Change of Bene	eficiary									
Dave ashler Varr may show	ana tha hamafiaiam, daalamatian	at any time un	on weitten vegueet							
1) The written consent of the 2) The divorce or seperation	age the beneficiary designation nge the beneficiary designation the current irrevocable beneficiary on decree (in the case where the the case where the current irrevo	n only if the following (ies) (see section current irrevocable)	lowing documents are n 5 of this form) ble beneficiary is the ex-							
	signated cannot modify the irreventhe same as marriage when con		•	, ,	petent officiant and registered with					

Designation

(complete section 4)

OR 🗌 Estate

(This term includes, in particular, legal heirs, assignees and successors)

Primary Beneficiary(ies)

Should no choice be made, the beneficiary designation is revocable, except in Quebec, where the designation of the married or civil union spouse as beneficiary is irrevocable, unless the "revocable" box has been checked.

Should the beneficiar	ry be named irrevocably, he wi	Il be required to o	consent to an	y future benefi	iciary de	signation mo	odification and	for any withdrawal of sums.
		(01	Relation to Annuitant (or in Quebec, relation to contractholder)				ty of Primary ficiary	
Last Name F	First Name	Spouse	Un- Married Spouse	Other	%	Rev.	Irrev.	Date of Birth (if minor)
								Y
								Y Y Y Y M M D D
								Y Y Y Y M M D D
								Y Y Y Y M M D D
Continuing or Conting	ficiary(ies) or Contingent gent Beneficiary designation is and complete the appended	optional.	s)					
•	ficiary(ies) a primary beneficiary, the assificiary may replace one or seve			replaces him	or her.			
	ficiary(ies) (Subrogated in Q ficiary has no rights unless all		aries are dece	eased.				
Last Name	First Name	First Name		Date of Birth		Complete only if you designate a continuing beneficiary(ies)		neficiary(ies)
Last Name	First Name		YYY	Y M M D Y M M D	D	b' Last i	vame, First N	ame of Primary Beneficiary ²
	of each continuing beneficiary named to reple e contingent beneficiaries and have entered the		must total 100%.					
Information Abou	t the Trustee (Does not ap	oply in Quebec)						
	n only if the beneficiary is a minapority. In Quebec, the paymen							
Name of Trustee	Name of Trustee Relation to Trustee							
4. Consentme	ent of the Current Ir	revocable	Benefici	ary (if app	olicabl	e)		
I, the designation(s), ad	ddition(s) or modification(s) red		e beneficiary	under the con	ntract ide	entified in se	ction 1 of this 1	form, give my consent to
X Current Irrevocable Beneficiary's Signature							Y Y Y Y M M D D	
	of Contractholder							Date
	o carry out the designation(s), a e subject to applicable legislati		dification(s) r	equested. I un	derstan	d that the va	lidity of the ne	w designation or the change
X								Y
Signature of Contr	actholder							Date
X								Y
Signature of co-co	ntractholder (where applical	ble)						Date

Protecting your personal information is a priority for Beneva. To find out more about our practices, please consult the *Personal Information Protection Statement* located at www.beneva.ca.

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