



PENSION PLAN OF THE UNITED CHURCH OF CANADA (Registration #0355230) PENSION PLAN SPOUSE DECLARATION AND BENEFICIARY DESIGNATION FORM

Please fill out this form completely. The information provided on this form will confirm and/or replace all previous forms on record.

I understand that I have the right to change my pension beneficiary at any time by written notice to the Benefits Centre, subject to the provisions of any applicable law or regulation. I further understand if my spouse and/or my designated pension beneficiary should predecease me and no other beneficiary has been appointed thereafter, any proceeds from the Pension Plan shall be payable to my estate. The information on this form is true and complete.

New Enrolment Change of Information

MEMBER NAME (LAST, FIRST)		EMPLOYEE ID
STEP 1 – DECLARATION OF SPOUSE		
SPOUSE NAME (LAST, FIRST)		
DATE OF BIRTH (mm/dd/yyyy)	GENDER	
ADDRESS		
EMAIL	TELEPHONE	
STEP 2 – DESIGNATION OF PENSION BENEFICIARY		
<p>Do not provide your spouse's name below. All pension benefits on death are payable to your spouse. Your spouse may complete a pre-retirement spousal waiver, which will allow you to designate another pension beneficiary. Contact the Benefits Centre for the waiver forms should you want to proceed with this process. If your spouse signs a pre-retirement spousal waiver, predeceases you, or if you do not have a spouse, all pension benefits on death are payable to your designated beneficiary. If you do not have a designated beneficiary on file or your designated beneficiary predeceases you, all pension benefits on death are payable to your estate. If your pension beneficiary is under age 18, you should consider naming a trustee (see Step 3). If you have more than five pension beneficiaries, attach a separate sheet with the applicable information.</p> <p>If you are required to appoint a specific beneficiary under a court order or other domestic contract, you must provide such an order or contract to the Pension Plan upon execution. The Pension Plan cannot comply with any order or contract it has not received and will not be responsible if a pension benefit was paid in conflict with a court order or domestic contract that has not been received.</p>		
BENEFICIARY NAME (LAST, FIRST)	RELATIONSHIP TO MEMBER	PERCENTAGE ALLOCATION
		%
		%
		%
		%
		%
Total		100%
STEP 3- DECLARATION OF TRUSTEE FOR MINOR DEPENDENTS		
Should any of the pension beneficiaries be under the Age of Majority, I hereby appoint the following individual as Trustee to receive any amount(s) payable to the(se) pension beneficiaries (Not applicable in Quebec).		
TRUSTEE NAME (LAST, FIRST)	RELATIONSHIP TO MEMBER	
TRUSTEE ADDRESS AND EMAIL		
STEP 4 – MEMBER AUTHORIZATION		
I understand that I have the right to change this information at any time by completing another form and filing with the Benefits Centre, subject to the provisions of any applicable law or regulation. I certify that the information on this form is true and complete.		
MEMBER SIGNATURE	DATE (mm/dd/yyyy)	