

# Beneficiary Nomination



Return the original completed form to Calgary Board of Education, HR Benefits Processing, 8<sup>th</sup> Floor, 1221-8th Street SW, Calgary, AB T2R 0L4

By completing this form, I revoke all previously nominated beneficiary nominations and make the following nomination, where permitted by law.

**Note:** If you want to make any of the beneficiaries you list below permanent, write 'irrevocable' beside their name. For example, this may be required as part of a separation agreement or a court order. If you designate an irrevocable beneficiary, then the irrevocable beneficiary's consent is required for you to either: (a) replace the irrevocable beneficiary or (b) decrease the coverage amount or the percentage of benefits payable to the irrevocable beneficiary. Please have the irrevocable beneficiary complete, sign and date the *Consent by Beneficiary* form. **Please complete the form and return to your plan administrator for handling.**

## 1 Plan member details

Plan member's last name		Middle initial	First name	
Date of birth (yyyy-mm-dd)	Contract number		Location/billing group number	Plan member ID
Address (street number and name)			Apartment or suite	
City			Province	Postal code
Telephone number	Email address			

## 2 Beneficiary nomination (to be completed by the plan member)

### IMPORTANT:

If you do not nominate a beneficiary, the proceeds will be paid to your estate.

If you are nominating a beneficiary who is a minor under the age of 18, please see section entitled *Nomination of trustee for minor beneficiary*.

Complete each section for any benefits for which you have coverage

Be sure you write the beneficiary's first and last name, as well as the relationship to you. The total allocation between your beneficiaries must equal 100%.

You must initial any changes or deletions. Correction fluid cannot be used.

Beneficiary for **Employee BASIC Life and Accidental Death Benefits (if applicable)**.

Last name	First name	Relationship to plan member	Percentage %

In Quebec, if you name your legal spouse (married or civil union) as the beneficiary, this beneficiary will be irrevocable unless you check the revocable box.  Revocable beneficiary

### 3 Nomination of trustee for minor beneficiary (Not allowed in Quebec)

If you wish to designate minor children under the age of 18 as beneficiaries, a trustee must be designated.

NOTE: 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.

Any payments becoming due while the beneficiary(s) is a minor under the age of 18 are to be made to

\_\_\_\_\_ as trustee, or failing such trustee to the duly appointed guardian of such minor child as trustee. Payment to said trustee will discharge the company.

### 4 Appointing Contingent Beneficiaries

If the beneficiaries listed in the beneficiary nomination section above are deceased at the time of my death, the following beneficiaries will receive the proceeds of my Basic and Optional (if applicable) benefits for which I have coverage.

Last name	First name	Relationship to plan member	Percentage %

In Quebec, if you name your legal spouse (married or civil union) as the beneficiary, this beneficiary will be irrevocable unless you check the revocable box.  Revocable beneficiary

### 5 Authorization and signature

**IMPORTANT:**

You must sign and date the form in ink.

- I confirm that I did not previously appoint an irrevocable beneficiary under this group benefits plan issued by Sun Life or any other insurer; or alternatively, that I obtained the consent of the irrevocable beneficiary to name the beneficiaries in this form.
- I authorize Sun Life Assurance Company of Canada (Sun Life) to collect, use and disclose relevant information about me to administer and audit the plan as well as pay claims with its reinsurers and the plan sponsor.

\*Any reference to Sun Life, its reinsurers or the plan sponsor includes their agents and service providers.

Plan member signature X	Date (yyyy-mm-dd)
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### 6 Respecting your privacy

Respecting your privacy is a priority for the Sun Life Financial group of companies. We keep in confidence personal information about you and the products and services you have with us to provide you with investment, retirement and insurance products and services to help you meet your lifetime financial objectives. To meet these objectives, we collect, use and disclose your personal information for purposes that include: underwriting; administration; claims adjudication; protecting against fraud, errors or misrepresentations; meeting legal, regulatory or contractual requirements; and we may tell you about other related products and services that we believe meet your changing needs. The only people who have access to your personal information are our employees, distribution partners such as advisors, and third-party service providers, along with our reinsurers. We will also provide access to anyone else you authorize. Sometimes, unless we are otherwise prohibited, these people may be in countries outside Canada, so your personal information may be subject to the laws of those countries. You can ask for the information in our files about you and, if necessary, ask us in writing to correct it. To find out more about our privacy practices, visit [www.sunlife.ca/privacy](http://www.sunlife.ca/privacy).