

Change of records form



Return completed form to the appropriate office of:
Sun Life Assurance Company of Canada, Group Retirement Services

Please **PRINT** clearly.

Plan and your personal information

Name of Plan Sponsor	Client ID	Plan
Your name (first, middle initial, last)	Account number	

Change of address

Your new address (street number and name, apartment or suite)		
City	Province	Postal Code
Telephone number (day) ()	Telephone number (evening) ()	Effective Date (d / m / y)
E-mail address		

Change of name

Your new name (first, middle initial, last)

Change of marital/relationship status - Defined Contribution Pension Plan or Simplified Pension Plan only

Note: Please also notify your Plan Sponsor of this change.

I certify, at the time of this declaration, based on the definition of spouse under applicable pension legislation:

I have a spouse.

Name of Spouse (first, middle initial, last)
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I do not have a spouse.

Change of beneficiary designation

The original version of this signed form is required to change your beneficiary designation (no fax or photocopy).

This change of beneficiary designation applies to the following products:

RRSP DCP/PP/SPP DPSP Non-registered plan EPSP TFSA RRIF

This designation only applies to those plan death benefits which are not, by law or by pension plan rules, payable to the surviving spouse.

I, the owner of the account, revoke any previous beneficiary designations and name as beneficiary for benefits due on my death:

Name of beneficiary	Relationship to you	Percentage of benefits
Name of beneficiary	Relationship to you	Percentage of benefits
Name of beneficiary	Relationship to you	Percentage of benefits

The following caution is required by Manitoba law. It may also be applicable in other jurisdictions.

Caution: Your designation of a beneficiary by means of a designation form will not be changed or revoked automatically by any future marriage or divorce. Should you wish to change or revoke your beneficiary in the event of a future marriage or divorce, you have to do so by means of a new designation.

Where Quebec law applies, a married or civil union spouse beneficiary is irrevocable unless you make the designation revocable by checking here: Revocable

Note: If you have a spouse when you die, the law may stipulate that the death benefit be paid to your spouse. If you wish to name your spouse for all benefits, please ensure that you complete the above beneficiary designation.

To appoint a trustee or administrator for a beneficiary who is a minor, please complete a 'Appointment of Trustee or Administrator for a Minor Beneficiary' form.

Your signature of authorization

Your signature X	Date (d / m / y)
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Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.