

## BENEFICIARY DESIGNATION AND SUCCESSOR ANNUITANT FORM (FOR REGISTERED PLANS)

Planholder's  
Last Name

Planholder's  
First Name

Init.

Account  
Number

I revoke any prior designation(s) of a beneficiary(ies), contingent beneficiary(ies) and/or successor annuitant(s) I have made for this Plan (whether on the RSP or RIF application form or separately in writing), and I make the following new designation(s) for the above Plan.

### A DESIGNATED BENEFICIARY For all provinces and territories except Quebec\*

I designate the following person as the beneficiary of the Plan, to receive the proceeds of the Plan upon my death. I understand that I may also name one or more contingent beneficiaries below, who will receive the proceeds of the Plan upon my death if the designated beneficiary dies before me. I understand that if I do not designate a beneficiary (or if the designated beneficiary and the contingent beneficiary(ies) die before me), my estate will be entitled to the proceeds of the Plan.

#### A. Designated Beneficiary

Last  
Name

First  
Name

Address  
Percentage  
Entitlement

Relationship  
% to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

#### B. Designated Beneficiary

Last  
Name

First  
Name

Address  
Percentage  
Entitlement

Relationship  
% to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

#### C. Designated Beneficiary

Last  
Name

First  
Name

Address  
Percentage  
Entitlement

Relationship  
% to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

### B CONTINGENT BENEFICIARY(IES) For all provinces and territories except Quebec\*

A contingent beneficiary(ies) will be entitled to receive the proceeds of the Plan upon my death if the designated beneficiary above has died before me. If I name more than one contingent beneficiary, then all the contingent beneficiaries (who are alive at my death) will share equally.

Contingent Beneficiary for ☐ A ☐ B ☐ C

Last  
Name

First  
Name

Address  
Relationship  
to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

Contingent Beneficiary for ☐ A ☐ B ☐ C

Last  
Name

First  
Name

Address  
Relationship  
to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

Contingent Beneficiary for ☐ A ☐ B ☐ C

Last  
Name

First  
Name

Address  
Relationship  
to Planholder

Date of  
Birth  
(YY/MM/DD)

SIN

\*BMO (M-bar Roundel symbol) is a registered trademark of Bank of Montreal, used under licence.

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## C SUCCESSOR ANNUITANT FOR A RRIF For all provinces and territories except Quebec\*

I designate my spouse or common-law partner, by naming them below, to be the successor annuitant for the Plan, to receive continuing payments from the Plan after my death. If I have designated both a successor annuitant below and a beneficiary(ies) above, and both are alive at my death, then the designation of successor annuitant takes precedence. The successor annuitant may, after my death, revoke or change the beneficiary(ies) of the Plan that I have designated. A successor annuitant cannot be designated if the Plan is locked-in (i.e. LIF or LRIF). My designation of a successor annuitant will not be effective if the person designated is no longer my spouse or common-law partner at the time of my death.

### Successor Annuitant for a RRIF

Last Name	First Name
Address	
Date of Birth (YY/MM/DD)	SIN

## D SIGNATURE OF AUTHORIZATION

Planholder's

Signature

Date

NOTE:

(YY/MM/DD)

**\*For QUEBEC:** Where the law of Quebec applies, a designation of successor annuitant and/or beneficiary(ies) made on this form cannot be given effect. Effect can only be given to a designation made in a Will or other written document that meets the requirements of a testamentary disposition under the law of Quebec.

**CAUTION:** Your designation of a successor annuitant or beneficiary(ies) for this Plan will not be revoked or changed automatically as a result of any future marriage or common-law relationship or breakdown of marriage or common-law relationship. It will be your responsibility to revoke or change the designation, if you wish.

**Minor Child:** Where a beneficiary is a minor child, it is the responsibility of the Planholder to ensure that a trustee and/or a guardian of the minor child's property has been validly appointed under applicable provincial law.

**Power of Attorney:** A designation of a successor annuitant or beneficiary(ies) made, changed or revoked by a person acting under a power of attorney is generally not valid under applicable provincial law and may not be given effect.