

# CHANGE IN BENEFICIARY



Please retain a completed copy for your own records.  
Complete one form for each account you wish to change your beneficiaries on.

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## 1. Account Information

Owner:  Number:

RRSP/SRRSP  LIRA/LRSP  TFSA  FHSA  RIF/SRIF/LIF/LRIF

## 2. Beneficiaries

 I hereby designate the following individuals as beneficiaries:

Title  Dr.  Mr.  Mrs.  Ms.  Mx. % of Assets

Last Name  First Name

Address

City  Province

Postal  Relationship

Email

For **TFSA** accounts, I have designated my spouse or common-law partner as my beneficiary, and elect to have my spouse or common-law partner, if then living, become the Survivor holder of the TFSA upon my death:

For **RIF** accounts, I have designated my spouse or common-law partner as my beneficiary, and elect to have my spouse or common-law partner, if then living, become the Successor Annuitant and receive payments after my death for as long as there are Fund Assets:

Title  Dr.  Mr.  Mrs.  Ms.  Mx. % of Assets

Last Name  First Name

Address

City  Province

Postal  Relationship

Email

For **FHSA** accounts, I have designated my spouse or common-law partner as my beneficiary, and elect to have my spouse or common-law partner, if then living, become the Survivor holder of the FHSA upon my death:

Title  Dr.  Mr.  Mrs.  Ms.  Mx. % of Assets

Last Name  First Name

Address

City  Province

Postal  Relationship

Email

## 3. Signature

 By signing here, I give authority to change the beneficiary on my registered accounts.

Signature   Date