



Designation of Beneficiary(ies)

Your pension plan encourages updating your beneficiary information directly through mypensionplan.ca. This quick, convenient and secure method will save you time and can be used to manage your pension information. **Registration is easy! Go to www.mypensionplan.ca.** Alternatively, please review the Important Information on the back of this form before filling in the relevant information and send the completed, signed and dated form to:
 PSM(CM)PP, c/o Alberta Pensions Services Corporation (APS)
 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9 Fax: 780-421-1652

SECTION 1 – PERSONAL INFORMATION (Please print)

The name you use here should be the full name you use for your banking and income tax purposes.

Last name First name and initials

Address

Telephone number (area code and number) Identifier number or social insurance number

Your pension partner's name (see the back of this form for a definition of pension partner)

SECTION 2 – BENEFICIARY INFORMATION (Please print)

I would like to designate the following beneficiary(ies)* of my Public Service Management (Closed Membership) pension benefits (must total exactly 100% or this form will not be valid). **Remember, your pension partner cannot be a beneficiary.**

beneficiary #1's first name middle initial last name relationship % of benefit

full address

beneficiary #2's first name middle initial last name relationship % of benefit

full address

beneficiary #3's first name middle initial last name relationship % of benefit

full address

beneficiary #4's first name middle initial last name relationship % of benefit

full address

total 100%

If one or more of the beneficiaries I named dies before me, any benefit payable will be divided equally among the remaining beneficiaries.

Personal information on this form is collected under the authority of section 9.2 of the Alberta *Public Sector Pension Plans Act* and section 33 of the Alberta *Freedom of Information and Protection of Privacy Act* for the purpose of allowing you to designate your beneficiary(ies). If you have any questions regarding the collection of this information, contact the Member Services Centre (MSC) at 1-800-358-0840 or write the MSC, c/o 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9.



Designation of Beneficiary(ies)

SECTION 3 – IMPORTANT INFORMATION

Pre-Retirement: Use this form to designate the beneficiary(ies) of your pension death benefits, if you were to die without a pension partner or if your pension partner dies before you. If you have a pension partner, he or she is **automatically** the sole beneficiary of your pension death benefits, unless your pension partner signs a pre-retirement death benefit waiver form or ceases to be your pension partner.

Post-Retirement: Use this form to designate your beneficiary(ies) after you have retired and are collecting a monthly pension. **Please remember that the naming of your pension partner and your choice of pension option are permanent and not reversible.** If you had a pension partner at the time you selected your choice of pension and your pension partner predeceases you, you can only designate a beneficiary if you chose a guaranteed term that has not expired.

Other considerations:

- You may wish to obtain legal and financial advice when estate planning.
- You should periodically review your designation and consider updating your beneficiary(ies) to reflect changes to your family, financial obligations and/or when a life event occurs.
 - You can name one or more people as beneficiaries. If you are naming a dependent minor child, you may want to name a trustee on behalf of the child.
 - If you would like to name your estate, please write the word “estate” instead of a person’s name. Note that if you do so, your pension death benefits would ultimately be subject to the claims of creditors.
 - If you would like to name a charitable organization, please write the full name and charitable organization number instead of a person’s name.
- Any future designation, including one in a Will, may invalidate this designation of beneficiary. If you choose to designate a beneficiary in your Will instead of this form, please make sure your pension plan is named.

SECTION 4 – PENSION PARTNER DEFINITION

“pension partner” means

- (i) a person who, at the relevant time, was married to a participant or former participant and
 - (A) was not judicially or otherwise separated from him, or
 - (B) if so separated, was wholly or substantially dependent on him,
- (ii) if there is no person to whom subclause (i) applies, a person who
 - (A) lived with the participant or former participant
 - (I) for the 5-year period immediately preceding the relevant time, or
 - (II) for the 2-year period immediately preceding the relevant time if there is a child born to that person and the participant or former participant, and
 - (B) was, during that period held out by the participant or former participant in the community in which they lived as his consort, or
- (iii) if there is no person to whom subclause (i) or (ii) applies, a person who was married to but separated from the participant or former participant and not dependent on him at the relevant time;

If you are not certain how the definition of pension partner applies to you, please contact the Member Services Centre at 1-800-358-0840.

SECTION 5 – YOUR SIGNATURE

By signing below, I confirm that the information on this form is, to the best of my knowledge and belief, complete and accurate.

signature

date (YYYY/MM/DD)

This is an official record that must be signed and dated to be valid. Keep a copy of the completed form and send the original to APS, PSM(CM)PP’s pension administrator.