

Appointment of beneficiary - registered mutual fund plans only



Applicable in Quebec for locked-in plans only

Plan number(s): IF _____ IF _____

I, _____, Planholder under the above mentioned Retirement Savings Plan(s) or Retirement Income Fund(s) hereby revoke all previous appointments of beneficiaries, and declare that all proceeds payable under the said plan(s) or fund(s) by reason of my death shall be paid to:

Beneficiary (print full name, use upper and lower case)	Relationship to planholder	Shares (%)

if living at death, otherwise to my estate. However, if a beneficiary predeceases me, that beneficiary's share shall be divided equally among the surviving beneficiaries. I reserve the right to change the beneficiary unless prohibited by law.

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

In some provinces and territories, the law on the validity and effect of this type of beneficiary designation is unclear. We urge you to seek the advice of your lawyer about this appointment. Sun Life Financial Investment Services (Canada) Inc. does not assume any responsibility of the validity or effect of this form.

Appointment of trustee for a minor beneficiary

Complete the following if a trustee is to be appointed for a minor beneficiary **(not applicable in Quebec)**.

And I appoint _____ as trustee to receive any payments on behalf of any beneficiary named under this appointment during the minority of such a beneficiary. I authorize the trustee to apply such payments, at the discretion of the trustee, solely for the support, maintenance, education and benefit of the beneficiary.

Signed at (city, province)	
Planholder's signature X	Date (d/m/y)
Witness to planholder's signature X	
Advisor's signature X	Advisor's Rep Code