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BENEFICIARY UPDATE

Firm/Company Name _____ Firm/Division # _____

Employee Name _____ Certificate # _____

The Employee completes this section of the form – Please print clearly in INK:

Primary Beneficiary Designation

I hereby name the following beneficiary of any Life Insurance benefits payable as a result of my participation in this plan.

Divided: ◯ **In equal shares to survivor(s)** (Do not need to enter % of benefit)
◯ **As per percentages below**

Last Name	First Name and Initial	% of Benefit (must total 100%)	Relationship to Employee	Date of Birth (YYYY/MM/DD)

Where Quebec law applies, a spouse beneficiary is irrevocable (an irrevocable beneficiary must consent to any change) unless you make the designation revocable by checking here: ◯ **Revocable**, I may change this designation at any time.

Trustee/Administrator Designation (must be over the age of majority)

If the beneficiary is under the age of majority (not applicable for QC residents), I appoint the trustee/administrator named below to receive any amount payable to a minor beneficiary under this policy. The trustee/administrator shall discharge the Insurer for the amount paid. I authorize the trustee/administrator to spend all or part of the amount, or interest earned on it, for the support or education of the minor.

Full Name **Relationship to Employee**

If you are designating a trustee/administrator, you should consult with a legal advisor and any proposed trustee/administrator.

For Quebec Residents: The appointment will be interpreted in accordance with provisions governing the administration of property of others, under Quebec Civil Code.

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Contingent Beneficiary Designation – OPTIONAL (Cannot be the same beneficiary as listed under Primary Beneficiary)

You may wish to designate a contingent beneficiary(ies) to receive any proceeds under this group policy if all of the primary beneficiary(ies), named above, should die before you. In that event, a contingent beneficiary will automatically be entitled to the benefit that would have been payable to the primary beneficiary(ies). Should there not be any surviving beneficiaries at the time of your death, the proceeds will be paid to your estate.

Divided: ◯ **In equal shares to survivor(s)** (Do not need to enter % of benefit)
◯ **As per percentages below**

Last Name	First Name and Initial	% of Benefit (must total 100%)	Relationship to Employee	Date of Birth (YYYY/MM/DD)

Where Quebec law applies, a spouse beneficiary is irrevocable (an irrevocable beneficiary must consent to any change) unless you make the designation revocable by checking here: ◯ **Revocable**, I may change this designation at any time.

Trustee/Administrator Designation (must be over the age of majority)

If the beneficiary is under the age of majority (not applicable for QC residents), I appoint the trustee/administrator named below to receive any amount payable to a minor beneficiary under this policy. The trustee/administrator shall discharge the Insurer for the amount paid. I authorize the trustee/administrator to spend all or part of the amount, or interest earned on it, for the support or education of the minor.

Full Name _____ **Relationship to Employee** _____

If you are designating a trustee/administrator, you should consult with a legal advisor and any proposed trustee/administrator.

For Quebec Residents: The appointment will be interpreted in accordance with provisions governing the administration of property of others, under Quebec Civil Code.

Declaration and Authorization for the Collection and Communication of Personal Information

All the information I have provided on the form is accurate and complete, to the best of my knowledge.

I authorize Maximum Benefit and its insurers to collect, use, maintain and disclose personal information relevant to this application for the purposes of benefit plan administration, assessment, investigation, claim management, underwriting and for determining plan eligibility. The non-exhaustive list of sources from which information can be collected includes medical and health professionals, facilities or providers, insurance companies, or other organizations/persons. This authorization is also valid for the collection, use and communication of personal information concerning my dependents, insofar as applicable to the administration of benefits under this plan.

I acknowledge that more specific information about collection and use of my personal information can be found in the Privacy and Terms of Use section of www.maximumbenefit.ca or from the administrator of my benefit program.

A photocopy or electronic version of this form is **not valid** for recording beneficiary designations.

Employee's Name (please print) _____

Employee's Signature _____ Date _____

The original of this form must be submitted. Photocopies are not accepted. Please mail this completed form to the address below.

MAXIMUM BENEFIT NATIONAL SERVICE CENTRE
1051 King Edward Street, Winnipeg, MB R3H 0R4 • 1 800 893-7587