

NOMINATION OF BENEFICIARY (Pre-retirement)

LOG ON TO My Account SAFELY AND SECURELY TO CHANGE YOUR BENEFICIARY(IES)

Information for plan member:

- This nomination will replace and revoke all previous nominations. Where you provide spousal information, you are confirming your spouse is your beneficiary and revoking all previous nominations.
- If you are a member of more than one pension plan that the Pension Corporation administers, for each pension plan you **must** complete a separate nomination and, if applicable, *Form 4: Spouse's Waiver of Beneficiary Right to Benefits in a Pension Plan, Locked-In Retirement Account, Life Income Fund or Annuity Before Pension or Annuity Payments Start* (Form 4).
- If you are divorced or separated, all nominations are subject to separation agreements and entered court orders. For more information, visit the plan website.
- You must let us know of any change of beneficiary designation.
- If you are thinking of other beneficiary arrangements, go to our website or contact us for more information.
- If not using My Account to change your beneficiary(ies), complete and return this form to us.
- For more information about nominating beneficiaries, visit the plan website.

PERSON ID

College Pension Plan
PO Box 9460
Victoria BC V8W 9V8

Web

college.pensionsbc.ca

Toll-free (Canada/U.S.):

1-888-440-0111

Complete sections A and B below.

A Plan member information

LAST NAME

FIRST NAME

ADDRESS (include unit number, if applicable)

CITY

PROVINCE

POSTAL CODE

COUNTRY

EMAIL

WORK PHONE

HOME PHONE

DATE OF BIRTH

YYYY-MM-DD

B Spousal information

- **If you have a spouse at the time of your death, your spouse is automatically your beneficiary unless they waive their rights on Form 4.**
- **Definition of Spouse:** Persons are spouses for the purposes of the *Pension Benefits Standards Act* on any date on which one of the following applies:
 - (a) they
 - (i) are married to each other, and
 - (ii) have not been living separate and apart from each other for a continuous period longer than two years;

- (b) they have been living with each other in a marriage-like relationship for at least two years immediately preceding the date.

Explanatory Note: Where spouses live apart because of work commitments or illness means, for pension purposes, they are not living separate and apart.

- If your relationship status changes, please notify the College Pension Plan.

Indicate your status by selecting one of the options below:

☐ I have **no spouse**: (separation date, if applicable) YYYY-MM-DD

OR

(death date, if applicable) YYYY-MM-DD

→ **Go to section C on page 2**

☐ I am married

☐ I am in a marriage-like relationship (at least two years): (cohabitation date) YYYY-MM-DD

SPOUSE LAST NAME

SPOUSE FIRST NAME

SPOUSE DATE OF BIRTH

YYYY-MM-DD

If you have a spouse and wish to nominate other beneficiaries, select one of the options below and continue to page 2:

- ☐ My spouse has waived their rights, a completed *Form 4* is attached or has been filed. I understand that unless my spouse's waiver is filed with the College Pension Plan, the beneficiary(ies) named on this form will not be valid. **(Ensure Form 4 is attached and completed in full, if it has not previously been submitted.)**
- ☐ My spouse is my beneficiary; however, I wish to nominate alternate beneficiary(ies) should I have no spouse at the time of my death.

Freedom of Information and Protection of Privacy Act—Your personal information is being collected by the BC Pension Corporation for pension plan administrative services, including the evaluation of such services. This collection is authorized under sections 26(c) and (e) of the *Freedom of Information and Protection of Privacy Act (BC)*. If you have any questions about this collection, contact the BC Pension Corporation's privacy team at penc.privacy@pensionsbc.ca or by phone at 778-698-6483.

© Beneficiary nomination

- If your spouse completed *Form 4* waiving their rights or you do not have a spouse at the time of your death, your pension entitlement will be paid to your nominated beneficiary(ies).
- You may nominate one or more person or organization (e.g., societies, charities, trusts or corporations) as beneficiary(ies).
- If you are divorced or separated, all nominations are subject to separation agreements and entered court orders. For more information, visit the plan website.
- **The total percentage of the benefit allocated to your beneficiaries must equal 100%. If there are no percentages indicated, the benefit will be divided equally, subject to rounding.**

BENEFICIARY #1 —Complete this section if you wish to nominate a beneficiary to receive all or a portion of your pension benefits.							
ENTER SHARE OF BENEFITS _____._____%		LAST NAME (OR ORGANIZATION NAME AND BRANCH)		FIRST AND MIDDLE NAME(S)		CRA OR REGISTRATION NUMBER (if organization)	
ADDRESS (include unit number, if applicable) ONLY INCLUDE ADDRESS IF DIFFERENT THAN SECTION A		CITY		PROVINCE	POSTAL CODE	COUNTRY	
EMAIL		PHONE NUMBER		RELATIONSHIP TO MEMBER		DATE OF BIRTH YYYY-MM-DD	
Trustee —The Public Guardian and Trustee of BC is the default trustee for a person under 19 years of age. Complete this section if you wish to nominate a different trustee to hold your pension benefit in trust for Beneficiary #1.							
LAST NAME (OR ORGANIZATION NAME AND BRANCH)				FIRST AND MIDDLE NAME(S)			
DATE OF BIRTH YYYY-MM-DD		PHONE NUMBER		EMAIL			
ADDRESS (include unit number, if applicable)				CITY	PROVINCE	POSTAL CODE	
BENEFICIARY #2 —Complete this section if you wish to nominate a beneficiary to receive all or a portion of your pension benefits.							
ENTER SHARE OF BENEFITS _____._____%		LAST NAME (OR ORGANIZATION NAME AND BRANCH)		FIRST AND MIDDLE NAME(S)		CRA OR REGISTRATION NUMBER (if organization)	
ADDRESS (include unit number, if applicable) ONLY INCLUDE ADDRESS IF DIFFERENT THAN SECTION A		CITY		PROVINCE	POSTAL CODE	COUNTRY	
EMAIL		PHONE NUMBER		RELATIONSHIP TO MEMBER		DATE OF BIRTH YYYY-MM-DD	
Trustee —The Public Guardian and Trustee of BC is the default trustee for a person under 19 years of age. Complete this section if you wish to nominate a different trustee to hold your pension benefit in trust for Beneficiary #2.							
LAST NAME (OR ORGANIZATION NAME AND BRANCH)				FIRST AND MIDDLE NAME(S)			
DATE OF BIRTH YYYY-MM-DD		PHONE NUMBER		EMAIL			
ADDRESS (include unit number, if applicable)				CITY	PROVINCE	POSTAL CODE	

- **Additional Beneficiary(ies)**—You can nominate multiple beneficiaries. You must include all information as above.
- **Alternate Beneficiary(ies)**—You can nominate multiple alternates. You must include all information as above and ensure each alternate beneficiary identified is associated with a nominated beneficiary. You can choose to give a different percentage to each alternate beneficiary, but the total shares must equal the same total percentage that has been allocated to the respective beneficiary.
- **Trustee Information**—The Public Guardian and Trustee of BC is the default trustee if you nominate a minor under age 19. You may designate a different trustee to hold in trust for the minor.

ENTER SHARE OF BENEFITS

_____ %

DATE SIGNED
YYYY-MM-DD

Plan Member: Make a copy of this completed form for your records before forwarding to the pension plan