

**⚠ IMPORTANT**

Before completing this form, please check with your plan administrator to find out whether it will be accepted or not, and whether you must designate your beneficiary online in My Client Space.

If this form is accepted, confirm with your plan administrator whether you should submit it to them or to iA Financial Group.

To complete this form, please print in ink. Then sign it by hand.

**BASIC INFORMATION**

Policyholder's name (Employer/organization) \_\_\_\_\_ Group policy no. \_\_\_\_\_

Plan member's name \_\_\_\_\_ Certificate no. \_\_\_\_\_

**APPOINTMENT OR CHANGE OF BENEFICIARY (If you do not appoint a beneficiary, the benefit will be payable to the estate.)**

This beneficiary designation revokes any previous one(s). If the previously designated beneficiary was irrevocable, complete this section as well as the "Irrevocable beneficiary" section.

**1. Primary beneficiaries**

If you name multiple primary beneficiaries, the total allocation must be equal to or less than 100%. If less than 100%, the difference will be payable to the estate. Please do not indicate dollar amounts.

First name	Last name	Relationship	Date of birth			%
			Y	M	D	

**2. Contingent beneficiaries**

If you wish, you can also appoint contingent beneficiaries in the event all primary beneficiaries predecease you. If you name multiple contingent beneficiaries, the total allocation must be equal to or less than 100%. If less than 100%, the difference will be payable to the estate. Please do not indicate dollar amounts.

First name	Last name	Relationship	Date of birth			%
			Y	M	D	

**IMPORTANT: For Quebec residents only – to be completed if you appointed your legal spouse (by marriage or civil union) as a beneficiary. If your spouse is a common-law spouse, proceed to the next section. This box does not apply to you.**

In Quebec, the designation of a legal spouse (married or civil union) as beneficiary is irrevocable\*, unless you check the following box:

Revocable beneficiary

\* To change the appointment of an irrevocable beneficiary, his/her written consent will be required.

**IRREVOCABLE BENEFICIARY (IF APPLICABLE)**

If you have appointed an irrevocable beneficiary, his/her written consent is required in order to change the designation. In that case, please have the irrevocable beneficiary sign below. Please note that the beneficiary must have attained the age of majority to provide his/her consent.

Irrevocable beneficiary's signature \_\_\_\_\_ Date 

Y	M	D

**TRUSTEE DESIGNATION (NOT APPLICABLE IN QUEBEC)**

⚠ In Quebec, there may be issues with respect to the appointment of a trustee. You should consult a legal advisor before appointing a trustee.

In all other provinces, you can complete this section. You can appoint a trustee to receive any amount due to any beneficiary under the age of majority.

Trustee's first name \_\_\_\_\_ Last name \_\_\_\_\_

**PLAN MEMBER CONFIRMATION/AUTHORIZATION**

**I CONFIRM** that the information contained in this form is true and complete.

**I CONSENT TO THE RELEASE** of the information in this form to my Employer/Policyholder and Industrial Alliance Insurance and Financial Services Inc., its employees, agents, reinsurers and service providers for the purpose of administration and claims processing.

**I AGREE** that a photocopy of this Confirmation/Authorization shall be as valid as the original.

Plan member's signature \_\_\_\_\_ Date 

Y	M	D