

Meridian™ Designation of Beneficiary

Instructions — The Designation of Beneficiary Form is subject to applicable law and can be used for your RRSP Contracts or TFSA Arrangement.

Please mail the completed form to:
Meridian Online Account Administration, 531 Lake Street, St. Catharines, ON L2N 4H6

We do not accept faxed or scanned RRSP or TFSA Designation of Beneficiary Forms

RRSP / TFSA Plan Holder Information

Planholder Surname	Given Name(s)	Type
Account N°.	Contract N°. (one contract per form only)	TFSA <input type="checkbox"/>
Address		RRSP <input type="checkbox"/>

RRSP / TFSA Beneficiary Designation

I designate the person(s) below as the Beneficiary(ies) for all Accounts held under my RRSP Contract / TFSA Agreement. Upon my death, all amounts under my RRSP Plan / TFSA Arrangement will be payable to the individual(s) listed below. I acknowledge that if more than one beneficiary is designated, they share equally, and if any beneficiary is deceased, all funds go to the surviving beneficiary(ies).

Name: _____	Relationship: _____
Name: _____	Relationship: _____
Name: _____	Relationship: _____
Name: _____	Relationship: _____

I declare that:

I hereby revoke any previous Designation of Beneficiary and declare that all sums falling due thereunder on or after my death be paid to the above specified names.

The Beneficiary(ies) designated above must survive me and accept this designation in order to receive benefits payable under this contract. The proceeds of this contract should be paid to the Beneficiary(ies) I have listed on this form and shared equally. If none of the Beneficiary(ies) designated above survive me, or none accept this designation, or if I have not designated any Beneficiaries, then the proceeds of this contract should be paid to my Estate upon my death. If any of the above Beneficiary(ies) do not survive me or do not accept this designation, then their portion of entitlement should be divided equally and paid to the surviving Beneficiary(ies).

TFSA arrangement: Where the sole primary beneficiary is my spouse, this designation shall also stand as a Successor Holder appointment, whereby the original TFSA arrangement continues in my spouse's name.

RRSP Plan/TFSA Arrangement Holder Signature: _____ Date: _____

Witness Signature: _____ Date: _____

Invalid if beneficiary signs as witness

NOTE:

1. If you wish to designate a Trustee for a minor or a Registered Charity as your beneficiary please visit your local branch or contact the Contact Centre at 1.866.592.2226.
2. If you wish to designate more than four beneficiaries to this RRSP Contract / TFSA Arrangement, please fill out more than one copy of this form and mail all copies to Meridian.