

# SPOUSAL INFORMATION AND BENEFICIARY DESIGNATION CHANGE FORM

Use this form to provide updated information about your spousal status or change your beneficiary(ies) for the payment of any death benefit that may be payable from the University Pension Plan Ontario (UPP). If you accrued an entitlement under a single employer pension plan that has been transferred to the UPP, the information you supply in this form applies to your full UPP entitlement including the pension earned for service under the single employer pension plan.

A. Member Information				
Employee Number				
First Name	Middle Name	Last Name	Date of Birth (mm/dd/yyyy)	
Home Address			City	Province
Postal Code	Country	Home phone number	Work phone number	
Email		Employer		
B. Spousal Declaration				
Under the UPP, a Spouse is a person who:				
(a) is married to you; (b) is not married to you, but is living together in a conjugal relationship with you continuously for a period of not less than 3 years; or (c) is not married to you, but is living together in a conjugal relationship with you in a relationship of some permanence, if together you are the parents of a child as set out in section 4 of the <i>Children's Law Reform Act</i> (Ontario), provided that the person is not living separate and apart from you on the date a determination of spousal status is required to be made.				
<i>I have read and understand the definition of Spouse above. Based on this definition, I certify that the following information is true:</i>				
Spousal Status:	Divorced <input type="checkbox"/>	Separated <input type="checkbox"/>	Widowed <input type="checkbox"/>	Date of change of Spousal Status (mm/dd/yyyy)
	Married <input type="checkbox"/>	Common-law <input type="checkbox"/>		
<i>I have a Spouse</i> <input type="checkbox"/> <i>(complete Spousal information below)</i>			<i>I do not have a Spouse</i> <input type="checkbox"/>	
Spouse First Name	Spouse Middle Name	Spouse Last Name	Spouse Date of Birth (mm/dd/yyyy)	
Date of marriage or start of common-law relationship (mm/dd/yyyy)				

## Information About Death Benefits

Under the UPP, a pre-retirement death benefit is payable in the event that you die before you commence receipt of your pension, or a post-retirement death benefit may be payable in the event that you die after you commence your pension, depending on the form of pension you have elected to receive.

If you have a Spouse on the date of your pre-retirement death or on the date your pension commences, subject to any court orders or domestic contracts regarding your pension, your Spouse is entitled to the payment of the death benefit, unless your Spouse has waived their right to a death benefit. In advance of waiving such rights, members and their Spouses are strongly encouraged to obtain independent financial advice from an organization or individual with appropriate pension knowledge.

Whether your Spouse is eligible to receive a death benefit is determined at the time of your death in accordance with the provisions of the UPP.

For pre-retirement death, if your Spouse is not eligible to receive a death benefit or has waived their right to such death benefit, you may designate a beneficiary(ies) to receive the pre-retirement death benefit. You may change your designated beneficiary(ies) at any time.

For post-retirement death, if at retirement you elect a form of pension with a guarantee period, you may designate a beneficiary(ies) to receive any benefits remaining payable within the guarantee period (that is not required to be paid to your Spouse). You may change your designated beneficiary(ies) at any time after retirement.

**C. Beneficiary Designation**

You can designate one or more person(s) or organization(s) (e.g. charities) as your beneficiary(ies) to receive the death benefit payable under the UPP that is not required by law to be paid to your Spouse. If you do not have a Spouse on the date of your death, or on the date on which your pension commenced and who is entitled to the death benefit and you have not named a Beneficiary(ies) or all of your Beneficiary(ies) have predeceased you, the pre-retirement death benefit will be paid to your estate. If more than one Beneficiary is named, the pre-retirement death benefit will be divided equally between the surviving Beneficiaries unless the percentage shares are allocated differently below and the allocations total 100%.

*Use this section to name your designated beneficiary(ies) to receive the death benefit under the UPP that is not required by law to be paid to a Spouse.*

*I have read and understand the information about the death benefit outlined above. I further understand that (1) if I die before commencing a pension from the UPP and I do not have a Spouse or my Spouse has waived the entitlement to the pre-retirement death benefit in the required form, my Beneficiary(ies) may be entitled to pre-retirement death benefits under the UPP, and (2) if I die after commencing my pension from UPP my Beneficiary(ies) may be entitled to post-retirement death benefits under the UPP depending on the form of pension I have elected to receive and whether I have a Spouse who is entitled to such death benefit.*

*I name the following persons as my Beneficiary(ies):*

Beneficiary(ies) name (first, middle, last)	Date of Birth (mm/dd/yyyy)	Relationship	Address	Percent (%) of benefit

**D. Trustee Appointment for Minor Beneficiaries (if applicable):**

If you designate a minor (an individual under the age of 18) as your Beneficiary, you may also appoint an individual or organization as trustee to receive the benefit in trust for the minor. If you make such an appointment, the designated Beneficiary will be the named trustee in trust for the minor child(ren) named above. Payment to the named trustee will constitute payment to the designated Beneficiary and the Board of Trustees of the UPP shall be discharged upon making such payment. If a trustee is not appointed for minor child(ren), payment will be made in accordance with applicable law, including the *Children’s Law Reform Act* (Ontario).

Trustee name:	Phone number:
Address:	

**Member’s Declaration**

- By completing section C. Beneficiary Designation for Pre-Retirement Death Benefit I hereby revoke any prior beneficiary designation relating to pre-retirement death benefits payable under the terms of the UPP.
- I confirm that the information provided on this form is true and accurate.
- I consent to the collection, use and disclosure of my personal information for the purpose of administering the UPP and any retiree group benefits that I may participate in the future.
- I authorize my personal information and that of my Spouse and Beneficiary(ies) to be collected, used and shared by and between the Board of Trustees of the UPP, any agents, delegates or service providers and participating employers, and as otherwise provided in the UPP Privacy Statement, all in accordance with the UPP Privacy Statement and applicable privacy laws. **The UPP Privacy Statement is available on the UPP website.**

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Member signature

\_\_\_\_\_

Date

\_\_\_\_\_

Employer Representative signature

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Date Form Received by Employer

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Employer Representative Name (please print)