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You can make this change in your online member account.
(some legislative restrictions may apply)

Designation of Beneficiary Variable Pension Benefit

When the form is completed and signed by you, return the original form to PEPP.

Reset Form

Designating a beneficiary is an important decision, so please take the time to review this form and make the correct decision for your situation. Most jurisdictions in Canada require that your spouse is your beneficiary provided they have not waived their rights. For clarification on designation of beneficiary, go to the PEPP website and ***read the PEPP Talk on Designation of Beneficiary***.

1 Tell Us About You (Please Print)

PEPP Member Number: Birthdate (day/month/year):

Last Name: First Name & Initial:

Phone Number(s): (home): (mobile): (work):

Relationship Status:

Spouse* : ☐ I am legally married ☐ I am common-law ☐ I am separated

No Spouse: ☐ I am single ☐ I am divorced ☐ I am widowed

If you have a spouse, legislation requires **your spouse to be your primary beneficiary** below, unless your spouse completes a *Spouse's Waiver of Designated Beneficiary Status* form available on the PEPP website. If your spouse has signed a waiver, attach the waiver with this completed form.

Spouse's Full Name	Birthdate (day/month/year)

Beneficiary type^: ☐ Specified Spouse ☐ Spouse

* Refer to the PEPP Talk on Designation of Beneficiary available on the PEPP website for the definition of spouse.
^ Please see last page of this form for a description of spouse beneficiary types.

2 Designating **Only** One Primary Beneficiary (for multiple beneficiaries go to Step 3)

☐ My spouse is my primary beneficiary (as defined in Section 1).

☐ My spouse has provided a *Spouse's Waiver of Designated Beneficiary Status* form and has waived 100% of my survivor benefit, and I would like to name the following as my primary beneficiary.

☐ I do not have a spouse and would like to name the following as my primary beneficiary. (go to Step 3 to name more than one beneficiary)

Primary Beneficiary's Full Name	Birthdate (day/month/year)	Relationship to member

Or;

☐ I do not have a spouse or my spouse has waived 100% of my survivor benefits and would like my survivor benefit to go to my estate:

Beneficiary	Name of Law Firm or Executor (if known)	Address/Contact Number
ESTATE		

Or;

☐ I do not have a spouse or my spouse has waived 100% of my survivor benefit and would like my survivor benefit to go to the following charity/organization:

Beneficiary's Name (Full name of charity/organization)	Address/Contact Number

3 Designating Multiple Primary or Contingent Beneficiary(ies)

☐ I have a spouse and want to name the following contingent beneficiary(ies) in the event my spouse predeceases me:

☐ I have a spouse who has waived _____ % of my survivor benefit and want to name the following beneficiaries:

☐ I do not have a spouse and want to name following beneficiaries:

There are two ways you can designate multiple beneficiaries, which are outlined below (please select one)

I am designating my beneficiaries as :

☐ **Joint Designation** - you are designating more than one beneficiary. **You do not indicate a percentage**. If you die, the survivor benefit will be shared among the living beneficiaries who you have listed in equal portions.

OR

☐ **In-common Designation** - you are designating more than one beneficiary. **You must state what percentage each individual will receive**. If any of the beneficiaries pre-decease you, their share can be distributed in three ways.

- ☐ their share will go to their descendents (e.g., children, grandchildren, and great-grandchildren).
- ☐ their share shall be divided amongst the other surviving beneficiaries (pro-rated based on their entitlement).
- ☐ their share will go to my Estate.

Primary Beneficiaries

Name (First, Middle and Last)	Relationship	Date of Birth	Portion (%)	Address

Contingent Beneficiaries

Name (First, Middle and Last)	Relationship	Date of Birth	Portion (%)	Address

If you name someone under the age of 18 as a beneficiary, you must name a trustee. A trustee is an individual or legal entity responsible for controlling the assets.

Beneficiary	Name (First, Middle and Last)	Address/Contact Number
TRUSTEE		

If more space is required, please complete another form, sign it and attach to this form.

4 Your Declaration

My signature indicates that I hereby revoke all previous designations and appointments of beneficiaries and name the beneficiaries above to receive the death benefit payable from the Public Employees Pension Plan.

_____ _____

Signature of Member (electronic signature will not be accepted) Date (dd/mm/yyyy)

REMINDER Life is always changing. As life events happen it is important for you to keep your designation of beneficiary(ies) current. By having your listed beneficiary(ies) up-to-date, you can ensure any benefit payable will be paid out as you intended. If you need to update your beneficiary(ies), simply complete and submit a new *Designation of Beneficiary* form to PEPP.

Spouse Beneficiary Types

If you have a spouse, that person is your beneficiary of 100 per cent of the survivor benefit. Unless they waive all or a portion of the survivor benefit.

You must choose a beneficiary type of "Specified Spouse" or "Spouse" to determine how your PEPP is managed in the event of your death.

Specified Spouse:

If you wish for your spouse to receive 100 per cent of the benefit and be able to remain in the VPB uninterrupted after your death, name your spouse as a specified beneficiary.

Your spouse will have several options and the time to choose how to handle the VPB account, or to just continue receiving payments from it until it is depleted. Only the spouse of the member can be a specified beneficiary. Specified beneficiary receives 100 per cent of the survivor benefit – no sharing.

Spouse:

Choose “Spouse” if your spouse will not be continuing the VPB account after your death or if your spouse is sharing the survivor benefit (has waived rights to all or a portion of benefit). This will allow you to designate all or a portion of the benefit to a beneficiary(ies) other than your spouse. If your spouse waives rights to all of the benefit show the portion waived. To waive these benefits your spouse must complete a *Spouse’s Waiver of Designated Beneficiary Status* form from our website and submit it to PEPP. Please see the PEPP *Talk* on *Variable Pension Benefit* for more information on beneficiary(ies).