

Beneficiary designation and authorization form (FPP)

Return completed form to:

Sun Life Financial, Group Retirement Services
 PO Box 11001 Stn CV, Montreal QC H3C 3P3

Nota : La version française de ce document est également disponible.

Please PRINT clearly.

1 Plan and your personal information

Name of Plan Sponsor The Trustees for the UBC Faculty Pension Plan			Client ID C0KHL	
First name		Middle initial	Last name	
Date of birth (dd-mm-yyyy)	Social Insurance Number*	Identification number		
Address (street number and name)			Apartment or suite	
City			Province	Postal code
Email address		Telephone number (day)		Telephone number (evening)

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

If you die prior to retirement, the BC Pension Benefits Standards Act provides that your spouse at the time of your death is entitled to 100% of the pre-retirement death benefit. Your spouse may waive their entitlement; however, they cannot be a partial beneficiary for any portion of the pre-retirement death benefit.

If you have a spouse when you die, the law may stipulate that all or part of the death benefit be paid to your surviving spouse, unless where provided, the spouse waives the death benefit. A beneficiary designation other than your spouse would only apply to those death benefits which are not, according to the law, payable to your surviving spouse. If you wish to ensure that your spouse receives all benefits, please designate your spouse here. In the absence of a beneficiary designation, and if not payable to your spouse as prescribed by law, death benefits will be paid to your estate. It is important for you to ensure that you specify in your will to whom the death benefit should be paid.

Spouse means, in relation to the Member, a person to whom, on the relevant date, one of the following applies:

- (a) the person is
 - (i) married to the Member, and
 - (ii) has not been living separate and apart (as described in the British Columbia Pension Benefits Standards Act) from the Member for a continuous period longer than 2 years
- (b) a person who has been living with the Member in a marriage-like relationship for a period of at least 2 years immediately preceding the relevant date.

Spouse does not include any person who is not recognized as a spouse or common-law partner for the purposes of any provision of the Income Tax Act (Canada) respecting registered pension plans.

To appoint a trustee for a beneficiary who is a minor, please complete the 'Appointment of trustee for a minor beneficiary' section.

To waive their entitlement, your spouse must provide the plan sponsor a duly completed "*Form 4 - Spouse's Waiver of Beneficiary Right to Benefits in a Pension Plan, Locked-In Retirement Account, Life Income Fund or Annuity Before Payments Start*", which must be signed and witnessed in the absence of the member **before the member's death**.

ENRLMNT



2 Beneficiary designation (primary) – Registered Pension Plan

Contract number

97270-G

Note: If you designate another person than your spouse as primary beneficiary, you must also complete section 3 below (Marital/Relationship status declaration).

I, the owner, revoke any previous beneficiary designations and name as beneficiary for benefits due on my death:

Beneficiary's first name	Middle initial	Last name	Relationship to you	Percentage of benefits
				%
				%
				%

3 Marital/Relationship status declaration

Note: If your status changes in the future, please complete/submit a 'Change of records' form and notify your plan sponsor.

I certify, at the time of this declaration, based on the definition of spouse applicable under pension legislation:

I have a spouse.

Spouse's first name	Middle initial	Last name	Date of birth (dd-mm-yyyy)

I do not have a spouse.

4 Contingent (secondary) beneficiary appointment

If you wish to appoint a contingent beneficiary, please complete this section.

If there is no surviving beneficiary at the time of my death, I declare that the following contingent beneficiary shall receive all benefits due on my death in accordance with any applicable legislation. If there is no surviving contingent beneficiary at the time of my death, the proceeds shall be paid to my estate.

Unless I indicate otherwise, this contingent beneficiary appointment applies to the above beneficiary designations.

I revoke all previous contingent beneficiary appointments.

Contingent beneficiary's first name	Middle initial	Last name	Relationship to you	Percentage of benefits
				%
				%
				%

5 Appointment of trustee for a minor beneficiary

If you wish to appoint a trustee for a minor beneficiary, please complete this section.

First name of minor beneficiary	Middle initial	Last name

Note: the Trustee may have to account for its administration to the Public Trustee.

Any amount payable to a minor beneficiary during his/her minority will be paid to the individual named hereunder, as Trustee for the minor child.

First name of trustee	Middle initial	Last name	Relationship to you

Payment to the Trustee shall discharge Sun Life Financial. Sun Life Financial cannot be responsible for the effect or sufficiency of the appointment.

6 Authorization

I authorize Sun Life Assurance Company of Canada, its agents and service providers, to obtain, use and transmit to my plan sponsor, its agents and service providers, my personal information for the purpose of plan administration.

I also authorize Sun Life Assurance Company of Canada, its agents and service providers to transmit my personal information to the advisor appointed by my plan sponsor, if any, or to my personal advisor for the purpose of enabling in-plan advisory services.

Your signature X	Date (dd-mm-yyyy)
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7 Respecting your privacy

Respecting your privacy is a priority for the Sun Life Financial group of companies. We keep in confidence personal information about you and the products and services you have with us to provide you with investment, retirement and insurance products and services to help you meet your lifetime financial objectives. To meet these objectives, we collect, use and disclose your personal information for purposes that include: underwriting; administration; claims adjudication; protecting against fraud, errors or misrepresentations; meeting legal, regulatory or contractual requirements; and we may tell you about other related products and services that we believe meet your changing needs. The only people who have access to your personal information are our employees, distribution partners such as advisors, and third-party service providers, along with our reinsurers. We will also provide access to anyone else you authorize. Sometimes, unless we are otherwise prohibited, these people may be in countries outside Canada, so your personal information may be subject to the laws of those countries. You can ask for the information in our files about you and, if necessary, ask us in writing to correct it. To find out more about our privacy practices, visit www.sunlife.ca/privacy.

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.