

BENEFICIARY NOMINATION

MEMBER'S NAME (PLEASE PRINT)	Contract no.	Location Name	Member ID. No.

Be sure member signs Beneficiary Card and clearly indicates FAMILY NAME, GIVEN NAME(S) and RELATIONSHIP TO MEMBER. Member should INITIAL ANY CHANGES OR DELETIONS.

WHERE QUEBEC LAW APPLIES, A SPOUSE BENEFICIARY IS IRREVOCABLE UNLESS YOU MAKE THE DESIGNATION REVOCABLE BY CHECKING HERE: <input type="checkbox"/> REVOCABLE	Beneficiary <i>(Please see over for suggested wording)</i>	Relationship to Member

Please note that according to legal requirements, Sun Life Assurance Company of Canada cannot pay out to beneficiaries who are minors. A trustee for minor children must be designated, except in Quebec where this is unacceptable by law. (See section below.)

BENEFICIARY TRUSTEE NOMINATION SECTION

(Not legally recognized in Quebec)

Any payment becoming due during the minority of the minor(s) to be made to _____

_____ as trustee, or failing such trustee, to the duly appointed guardian of such minor child as trustee. Payment to said trustee shall discharge the company.

Member Signature _____

Date _____

Sun Life Assurance Company of Canada is a member of the Sun Life Financial group of companies.

Below are some suggested designations and the acceptable wording to be used.

Beneficiary designation	Acceptable wording of designation
Estate or Legal Heirs	Estate or Legal Heirs
One beneficiary	Martha Doe, wife
Two beneficiaries in succession (primary and secondary beneficiary)	Martha Doe, wife, or in the event of her death, Richard Doe, son
Two beneficiaries in equal shares	Jane and Martha Doe, children
Primary beneficiary followed by two secondary beneficiaries in equal shares	Martha Doe, wife, or in the event of her death, Jane and Mary Doe, children
Two beneficiaries in percentages (not in equal shares) Note: if one of the beneficiaries pre-deceases the employee, the share of the deceased beneficiary would be paid to the employee's estate. If that share should be paid to the remaining beneficiary, the following must be added:	John Smith 40% and Sally Smith 60%, parents In the event of the death of one beneficiary, his/her share is to be paid to the surviving beneficiary.
Trustee for minor children other than in the province of Quebec	Mary and John Doe, children. Any payment becoming due during their minority to be made to John Smith, as Trustee or failing such Trustee, to the duly appointed guardian of such child as Trustee. Payment to said Trustee shall discharge the Company.
Trustee for minor children in Quebec	Unacceptable by law