Spouse And Beneficiary Designation – Pension Plan

Plan Name **Brock University**
Plan Registration Number **0327767**
Name of Member _____
ID Number _____

❒ ***Initial Designation*** ❒ ***Revised Designation***

In accordance with pension benefits legislation and the terms of the plan, your Spouse* may be entitled to certain benefits following your death, regardless of any beneficiary you have named. Benefits not payable to your Spouse* will be paid to your beneficiary.

Designation Of Spouse ***(definitions on the reverse side of this form)***

❒ I have a Spouse*, as defined by the applicable legislation.

Spouse's Name: _____
Last First Initial

Spouse's Date of Birth: _____
Day/Month/Year

Spouse's Gender: Male ❒ Female ❒

❒ I do not have a Spouse*, as defined by the applicable legislation.

Designation Of Beneficiary

I revoke any previous beneficiary designation. I appoint the following beneficiary to receive any amounts payable from the plan, in the event of my death:

Please refer to information on back of form regarding payment of death benefit

❒ My Spouse*, as designated above _____%

❒ Name(s) Relationship(s)

_____	_____	%_____
_____	_____	%_____
_____	_____	%_____
_____	_____	%_____
		100%

I reserve the right to revoke the designation of my beneficiary, including the designation of my spouse. I acknowledge that all designations remain in effect until they are revoked in writing and received by my employer.

_____ _____
Signature of Member Signature of Witness

_____ _____
Date Day/Month/Year Name of Witness (Please Print)

Definition of Spouse
Under the Ontario Pension Benefits Act

Your spouse is the person who, at the date a determination of spousal status is required:

(a) is married to you and is not living separate and apart from you; or

(b) is not married to you and has been living with you:

(i) in a conjugal relationship continuously for a period of not less than three years; or

(ii) in a conjugal relationship of some permanence if you both are the natural or adoptive parents of a child.

In accordance with the Brock University Pension Plan and the Ontario Pension & Benefits Act, pension death benefits are paid as follows:

Benefits earned prior to January 1, 1987: the named beneficiary(ies) at the time of death will receive the pension benefit according to the percentages allotted (regardless of whether there is a spouse at the time of death).

Benefits earned after December 31, 1986: the spouse at the time of death automatically receives the total pension benefit (100%), regardless of whether the member has designated other people as beneficiaries. A spouse can sign a Pre Retirement Death Benefit waiver, which would allow the member to designate other people as beneficiaries. This waiver can be revoked by the spouse anytime prior to the death of the member.