

INSTRUCTIONS FOR COMPLETION OF BENEFICIARY CHANGE FORM

ALBERTA SCHOOL BOARDS ASSOCIATION SUPPLEMENTAL INTEGRATED PENSION PLAN (SiPP) / SUPPLEMENTARY EXECUTIVE RETIREMENT PROGRAM (SERP)

1. Complete the attached form for any member wishing to add a Pension Partner or change their beneficiary.
2. If the member is requesting to remove a Pension Partner, additional documentation will be required (such as a Separation Agreement, Court Order, or Death Certificate).
3. Send the above information to Brendan Engle, Morneau Shepell, Suite 400 – 411 Dunsmuir Street, Vancouver, BC, V6B 1X4.

If you have any questions about completing the form please contact Brendan Engle at asbapension@morneaushepell.com or (604) 642-5200 ext. 4534. Morneau Shepell also provides a toll free line at 1-800-663-0790.

BENEFICIARY CHANGE FORM

ALBERTA SCHOOL BOARDS ASSOCIATION SUPPLEMENTAL INTEGRATED PENSION PLAN (SiPP) / SUPPLEMENTARY EXECUTIVE RETIREMENT PROGRAM (SERP)

Member Name: _____

School District: _____ Social Insurance Number: _____

Pension Partner Information (see next page for definition of Pension Partner):

Name: _____
Surname First Name Initial

Gender: Male Female Birth Date: _____
Day Month Year

I wish to remove a Pension Partner (A copy of your Separation Agreement, Court Order, or Death Certificate is required.)

Beneficiary Information:

I hereby designate, subject to any overriding legal Pension Partner's right, the following person(s) as revocable beneficiary(ies) of any monies payable under the SiPP and SERP (if applicable) upon my death.

_____	_____	_____
Full Name	Relationship	% of Entitlement
_____	_____	_____
Full Name	Relationship	% of Entitlement
_____	_____	_____
Full Name	Relationship	% of Entitlement

Unless specified, shares will be divided equally.

The following must be completed if any beneficiary is a minor:

_____ my _____ if living shall be and is hereby nominated
Name Relationship
and appointed trustee to receive and disburse any monies payable hereunder to a child aforesaid during minority and any payment so made to the said trustee shall discharge the Fund Holder to the extent of such payment.

I understand that in the event of my death prior to the commencement of my pension, death benefits will be payable to my Pension Partner. If I do not have a Pension Partner at the date of my death, any death benefits will be payable to my designated beneficiary, or to my estate if I have not named a beneficiary.

Signature of Member

Date

Signature of Witness

Date

“Pension Partner” means,

- (a) a person who, at the relevant time, is married to the Member and has not been living separate and apart from the Member for three or more consecutive years;
- (b) if there is no person to whom subsection (a) applies, a person who has lived with the Member in a marriage-like relationship
 - (i) for a continuous period of at least three years preceding the date, or
 - (ii) of some permanence, if there is a child of the relationship by birth or adoption; or
- (c) if there is no person to whom subsection (a) or (b) applies, a person who otherwise qualifies as a pension partner under the terms of the LAPP or ATRF as the case may be.

There shall be only one Pension Partner for the purposes of the SiPP and/or SERP. A person’s qualification as a Pension Partner shall be established to the satisfaction of the ASBA SiPP Governance Board.

The information being collected on this form is in accordance with the Freedom of Information and Personal Privacy Act and will be provided to companies contracted by ASBA to administer the SiPP.