

BENEFICIARY CHANGE REQUEST FORM

List the policy number(s) for which you would like to change the beneficiary:

Policy #	Policy #	Policy #	
	Name (First, Middle, Last)	Date of Birth (dd/mm/yyyy)	Phone #
Policy Owner(s):			

Beneficiary will be revocable unless stated to be irrevocable. Where Quebec law applies, if you name your spouse (married or civil union) as beneficiary, it is irrevocable unless you stipulate it as revocable by checking here Revocable

Primary Beneficiary Change: The primary beneficiary(ies) receives the policy benefits when the insured person dies. I designate the following Primary beneficiary(ies):

Name (First, Middle, Last)	Relationship to Insured	Benefit shared equally unless % specified	Date of Birth if a minor (dd/mm/yyyy)	Name of Trustee for minor (not applicable in PQ)

Contingent Beneficiary Change: The contingent beneficiary(ies) receives the policy benefits if all the primary beneficiaries are deceased at the time of the insured's death. I designate the following Contingent beneficiary(ies):

Name (First, Middle, Last)	Relationship to Insured	Benefit shared equally unless % specified	Date of Birth if a minor (dd/mm/yyyy)	Name of Trustee for minor (not applicable in PQ)

Ensure both pages of this form are submitted for processing

Please note: While using the Internet and e-mail is convenient, sending confidential and personal information through the Internet is not secure. E-mail is vulnerable to interception. If this form contains confidential or personal information, you should consider sending this form to us other than by e-mail. You can contact us at 1.800.722.6615 for contact information. Equitable Life is not responsible for any loss or damages you may incur or if your information is intercepted and misused, if you send confidential or personal information to us over the Internet.

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Critical Illness Beneficiary: For benefits payable while life insured is alive. I designate the following beneficiary(ies):

Name (First, Middle, Last)	Relationship to Insured	Benefit shared equally unless % specified	Date of Birth if a minor (dd/mm/yyyy)	Name of Trustee for minor (not applicable in PQ)

Critical Illness Beneficiary: Return of premium on death. I designate the following beneficiary(ies):

Name (First, Middle, Last)	Relationship to Insured	Benefit shared equally unless % specified	Date of Birth if a minor (dd/mm/yyyy)	Name of Trustee for minor (not applicable in PQ)

I, the policy owner confirm that the named beneficiary(ies) will cancel and replace all previous beneficiary and trustee designations. (If policy has multiple owners, all owners must sign. If company is owner, please specify officer's name and title). Any appointment of a beneficiary or any change is effective when received by Equitable Life of Canada. We assume no responsibility or liability for the validity or effect of any appointment or change. Any payments made will be in accordance with applicable laws.

_____ Date

Signature(s) of Policy Owner

Signature of Witness

If Applicable, Release of Interest as Irrevocable Beneficiary:

Signed in _____ on _____

(city and province) (dd/mm/yyyy)

Signature of Irrevocable Beneficiary(ies) Signature of Witness

Print name of Irrevocable Beneficiary(ies) Print name of Witness

Signed in _____ on _____

(city and province) (dd/mm/yyyy)

Signature of Irrevocable Beneficiary(ies) Signature of Witness

Print name of Irrevocable Beneficiary(ies) Print name of Witness

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INSTRUCTIONS FOR BENEFICIARY DESIGNATIONS:

1. If no beneficiary is named, the proceeds will be paid according to applicable law.
2. If a beneficiary is to be designated as irrevocable, that must be specified next to the beneficiary's name. If the beneficiary designation is specified as irrevocable, the signature of the irrevocable beneficiary is required to make any future beneficiary changes. If the current beneficiary is designated irrevocable, the beneficiary change will not be effective unless the irrevocable beneficiary releases their interest as a beneficiary.
3. Where Quebec law applies designation of the owner's spouse (married or civil Union) is irrevocable, unless the owner stipulated the designation to be revocable.
4. If a trust is designated for a minor beneficiary, the proceeds will be paid to the trustee as long as the beneficiary is a minor. Once the minor beneficiary reaches the age of majority, the proceeds will be paid directly to him or her, according to applicable law. This does not apply in Quebec.
5. If a trust is designated as a beneficiary, ensure the full and complete name of the trust is listed.
6. List name of children individually instead of "All my children" to avoid delay in receiving proceeds at time of claim.

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