

# THE UNIVERSITY OF MANITOBA PENSION PLAN (1993)

## CHANGE OF INFORMATION DESIGNATION OF NEW BENEFICIARY

### PERSONAL INFORMATION

\_\_\_\_\_  
*Social Insurance Number*

\_\_\_\_\_  
*Employee Number*

\_\_\_\_\_  
*Last Name*

\_\_\_\_\_  
*Given Name*

### DESIGNATION OF NEW BENEFICIARY

I hereby revoke any previous designation and designate the following as beneficiary of any monies payable upon my death.

**You may designate anyone to be your beneficiary. However, if you have a spouse or common-law partner at your date of death, pension legislation requires the pre-retirement death benefit to be paid to your spouse or common-law partner, regardless of the beneficiary designation, unless:**

- i. you are living separate and apart from your spouse or common-law partner by reason of relationship breakdown, or
- ii. your spouse or common-law partner has waived the right to the pre-retirement death benefit by completing Manitoba's Waiver of Survivor Death Benefit (Form 2). In this case, legislation does not allow you to name your spouse or common-law partner as your beneficiary.

**Caution:**

- Should you wish to change your beneficiary (e.g., in the event of a breakdown of your declared spouse/common-law relationship), you will have to do so by means of a Change of Information form available from the Pension Office.
- Benefits cannot be paid to beneficiaries who are minors (under the age of 18) or who are unable to act on his/her behalf. Trustee Nomination forms are available from the Pension Office.

If you do not have a spouse/common-law partner at your date of death, the pre-retirement death benefit will be paid according to your beneficiary designation. All beneficiary designations are revocable.

If you wish to name your estate as beneficiary, please enter ESTATE in the name line and do not complete the remainder of the information.

*See over...*

Return completed form to: Pension Office | 180 Extended Education Complex | Winnipeg | MB | R3T 2N2

I hereby designate the following person or persons as revocable beneficiaries of any monies payable under the Pension Plan upon my death.

If a designated beneficiary dies before me, their entitlement will revert to the surviving primary beneficiaries in equal shares. If there is no surviving primary beneficiary, the death benefit will be paid to the secondary beneficiaries. If there is no designated or surviving secondary beneficiary, the death benefit will be paid to my estate.

## PRIMARY BENEFICIARIES

Last Name	Given Name	Relationship to you	% Payable to each	Minor
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
Total			100%	

## SECONDARY BENEFICIARIES

A secondary beneficiary will not receive any benefits if a primary beneficiary is alive at my death.

Last Name	Given Name	Relationship to you	% Payable to each	Minor
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
Total			100%	

**I hereby confirm that the above information is correct. This personal information is being collected under the Authority of The University of Manitoba Act and will be used for purposes of pension plan administration.**

**I authorize the University of Manitoba to exchange personal information with benefit service providers and/or organizations who provide advice and service in the management of the group pension plans. This information is protected by the Protection of Privacy provisions of *The Freedom of Information and Protection of Privacy Act*. If you have any questions about the collection of information, contact the Access & Privacy Coordinator Office, (204) 474-8339, University of Manitoba.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Employee