

# Research Pension Plan

## Change of Beneficiary Form

USASK  
PENSION

### Section A: Member Information

|   |                    |            |                          |                 |
|---|--------------------|------------|--------------------------|-----------------|
| Your employer<br>University of Saskatchewan | Client ID<br>COKKG | Plan<br>02 | Policy Number<br>63667-G | Employee Number |
| First name                                  | Last name          |            |                          |                 |

### Section B: Change in Spousal Relationship (see reverse for definition of spouse)

|       |        |                 |            |           |          |         |                                   |
|-------|--------|-----------------|------------|-----------|----------|---------|-----------------------------------|
| From: | Single | Legally married | Common-law | Separated | Divorced | Widowed | Date Effective<br>(if applicable) |
| To:   | Single | Legally married | Common-law | Separated | Divorced | Widowed |                                   |

Attach applicable acceptable documentation (listed on reverse)

### Section C: Change in Beneficiary Designation

In Saskatchewan, pension legislation requires death benefits from a pension plan to be paid entirely to your spouse. If you wish to name someone other than your spouse as your primary beneficiary, your spouse must sign the "Spouse's Waiver of Pre-retirement Survivor Benefit" form. This form is available from the Pension and Benefits Office.

#### PRIMARY BENEFICIARY

My spouse

|                      |                     |                            |
|----------------------|---------------------|----------------------------|
| First name of spouse | Last name of spouse | Date of birth (mm/dd/yyyy) |
|----------------------|---------------------|----------------------------|

I do have a spouse, but they have waived any Pre-retirement Survivor Benefit (form attached) and I want to name the following as my Primary Beneficiary(ies):

I do not have a spouse and I want to name the following as my Primary Beneficiary(ies):

|            |           |                     |                            |                    |
|------------|-----------|---------------------|----------------------------|--------------------|
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |

#### CONTINGENT BENEFICIARY(IES)

You may wish to name a contingent beneficiary(ies) in the event your primary beneficiary(ies) has predeceased you.

|            |           |                     |                            |                    |
|------------|-----------|---------------------|----------------------------|--------------------|
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |
| First name | Last name | Relationship to you | Date of birth (mm/dd/yyyy) | % of benefits<br>% |

If you name more than one beneficiary but you do not allocate percentages, the benefit will be split between the beneficiaries in equal amounts.

#### TRUSTEE FOR A CHILD

If you have named a child as a beneficiary and that child is a minor, you must also appoint a trustee. The trustee will receive any benefit payment in trust that may become due while the child is still a minor. Please ensure that your trustee is not the individual named as your primary beneficiary.

|                       |                      |                     |
|-----------------------|----------------------|---------------------|
| First name of trustee | Last name of trustee | Relationship to you |
|-----------------------|----------------------|---------------------|

### Section D: Member Declaration

|           |                   |
|-----------|-------------------|
| Signature | Date (mm/dd/yyyy) |
|-----------|-------------------|

# Comments and Instructions

## Acceptable documentation

When dissolving a spousal relationship, you will need to supply the Pensions and Benefits Office with a:

- Divorce certificate; or
- Declaration of change in spousal relationship (common-law); or
- Interspousal separation agreement; or
- Spouse's death certificate.

## Definition of Spouse

A spouse is:

- Married to a member, or
- If a member is not married, a person with whom the member is cohabiting in a conjugal relationship at the relevant time and who has been cohabiting in a conjugal relationship continuously with the member as his or her spouse for at least one year prior to the relevant time.

## Designation of Beneficiary

If you have a spouse, your spouse must be named as your beneficiary, unless your spouse completes a *Spouse's Waiver of Pre- Retirement Survivor Benefit* form or the relationship is legally dissolved. The form is available from the Pension and Benefits Office.

If you have no surviving beneficiary, any benefit payable will be made to your estate.

## Intention

Before signing and returning this form, ensure that your beneficiary designation(s), together with your will, carry out your intent for the distribution of your survivor's benefits.

## Minors

In general, provincial legislation does not allow payment of benefits directly to minors. If you name a minor as a beneficiary, you must also appoint a trustee. The trustee will receive any benefit payment in trust that may become due while the child is still a minor.

## Responsibility

It is your responsibility to ensure that the designations are up to date and reflect your intentions at all times. Changes in your marital or family status may indicate a need to update your beneficiaries. Forms are available from the Pension and Benefits Office.

### For more information, please contact:

#### Pension and Benefits Office

Email: [pension@usask.ca](mailto:pension@usask.ca)

Tel: (306) 966-6633



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