



Designation of Beneficiary(ies)

Your pension plan encourages updating your beneficiary information directly through mepp.ca. This quick, convenient and secure method will save you time and can be used to manage your pension information. Registration is easy! Go to mepp.ca and click login in the top right corner. Alternatively, please review the important information on this form before filling in the relevant parts. If you have questions please call MEPP at 1-877-889-MEPP (6377). Send the completed, signed and dated form to:
MEPP 5103 Windermere Blvd. SW Edmonton, AB T6W 0S9
Fax: 780-421-1652

How to use this form:

I am:	I need to read:	I need to complete:
An active or deferred member (not receiving a pension)	Sections 1, 4, 5, 6	Part I, II, III, IV
A retiring or retired member (about to receive or receiving a pension)	Sections 2, 4, 5, 6	Part I, II, III, IV
A surviving pension partner, an ex-pension partner, or a beneficiary	Sections 3, 5, 6	Part I, III, IV

SECTION 1: YOU ARE AN ACTIVE OR DEFERRED MEMBER

Use this form to designate the beneficiary(ies) who will receive a death benefit if you die while an active or deferred member and are not survived by your pension partner, if applicable. If you do not designate any beneficiary(ies) and are predeceased by your pension partner, if applicable, the death benefit will be paid to your estate.

If you have a pension partner, they are automatically first in line for any death benefits if you die while you are an active or deferred member. Even if your pension partner waives their rights to a death benefit, they still cannot be designated as a beneficiary. Do not list your pension partner as a beneficiary in Part II. For your reference, a description of the term 'pension partner' is provided in Section 4. If you have a pension partner, please ensure you have completed a *Pension Partner Information* form to provide us with their information.

SECTION 2: YOU ARE RETIRING OR YOU ARE A RETIRED MEMBER

Use this form to designate the beneficiary(ies) who will receive a death benefit if you die after starting to receive a pension and are not survived by your pension partner or nominee, if applicable.

If you did have a pension partner at retirement, any death benefit will be paid to your pension partner first, unless they have waived their rights to a survivor benefit. If your pension partner has waived their rights, they may be listed as a beneficiary in Part III. If your pension partner predeceases you or they waived their rights to a survivor benefit and there is time left in the guaranteed period associated with your pension option, the death benefit will be paid to your beneficiary(ies), or if you have not designated any, to your estate. Keep in mind that the beneficiary(ies) you designated while an active or deferred member will still be applicable if you do not make any new designations prior to your death.

If you did not have a pension partner at retirement, and there is time left in the guaranteed period associated with your pension option, the death benefit will be paid to your beneficiary(ies), or if you have not designated any, to your estate. Keep in mind that the beneficiary(ies) you designated while an active or deferred member will still be applicable if you do not make any new designations prior to your death.

You should not designate any beneficiary(ies) if:

- You are a retiring member and you are selecting a form of pension with no guaranteed period, or
- You are a retired member who selected a form of pension with no guaranteed period, or the applicable guaranteed period has already expired.



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SECTION 3: YOU ARE A SURVIVING PENSION PARTNER, AN EX-PENSION PARTNER, OR A BENEFICIARY

Use this form to designate the beneficiary(ies) who will receive a death benefit if you die after commencing to receive a pension benefit and there is time left in the guaranteed period associated with the pension benefit you are receiving. If you do not designate any beneficiary(ies), the death benefit will be paid to your estate.

- **Pension partners and ex-pension partners:** If there is no guaranteed period associated with the pension benefit you are receiving, or if the applicable guaranteed period has expired, you should not designate any beneficiary(ies).

SECTION 4: DETERMINING IF YOU HAVE A PENSION PARTNER

“Pension partner” means

- (i) a person who, at the relevant time, was married to a participant or former participant and had not been living separate and apart from him or her for 3 or more consecutive years, or
- (ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with the participant or former participant in a conjugal relationship
 - (A) for a continuous period of at least 3 years, or
 - (B) of some permanence, if there is a child of the relationship by birth or adoption;

Persons are living separate and apart

- (a) if they are living apart and either of them has the intention to live separate and apart from the other, or
- (b) if, before the relevant time,
 - (i) they had been living separate and apart for any period, and
 - (ii) that period was interrupted or terminated by reason only that either of them became incapable of continuing to live separate and apart or of forming or having the intention to continue to live separate and apart of that person's own volition,

and the separation would probably have continued if that person had not become so incapable.

Remember: You can only designate your pension partner as a beneficiary in very specific circumstances. Please ensure you review the relevant instructions provided in Section 1 or 2, as applicable, to determine if you can list your pension partner as a beneficiary in Part III.

SECTION 5: DESIGNATING A MINOR CHILD, REPRESENTED ADULT, A CHARITY, OR YOUR ESTATE AS YOUR BENEFICIARY

If you are designating a minor child, represented adult, a charity, or your estate as your beneficiary, please review the relevant content below before completing Part III.

- **Minor child:** If you would like to designate a minor who is under 18 years of age as your beneficiary, we recommend you name an adult over the age of 18 as trustee. Please complete the applicable fields in Part III indicating that the beneficiary is a minor and provide the full name of the trustee. If you do not name a trustee, the default trustee for any minor beneficiary will be the public trustee.
- **Represented adult:** If there is a trusteeship order, please complete the applicable fields in Part III indicating the trustee and provide the full name of the trustee.
- **Charity:** If you would like to designate a charitable organization as your beneficiary, please complete the relevant fields in Part III with the full name and charitable organization number. Do not list a specific person associated with the charitable organization.
- **Estate:** If you would like to designate your estate as your beneficiary, please write “estate” instead of a person's name in the relevant field in Part III. Please note that if you designate your estate as your beneficiary, the amount payable to your estate will be subject to the claims of creditors, if applicable.

SECTION 6: LEGAL INFORMATION

You may wish to obtain legal and financial advice when estate planning.

Any future beneficiary designations, including those in a Will, may invalidate this designation of beneficiary(ies). If you choose to designate the beneficiary(ies) of any MEPP benefit entitlement using your Will instead of this form, please make sure the designation relates to your MEPP benefit.

For more information about designating beneficiaries, please visit mepp.ca or contact the Member Services Centre at 1-877-889-MEPP (6377).



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PART I – YOUR PERSONAL INFORMATION

My personal information is as follows:

Last name	First name and initials
Full mailing address	
Phone number(s) (including area code)	MEPP identifier number or social insurance number

PART II – YOUR PENSION PARTNER INFORMATION (if applicable)

Remember: If you have a pension partner, please ensure you have also completed a Pension Partner Information form.

Last name	First name and initials
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PART III – YOUR BENEFICIARY(IES) INFORMATION

Instruction: Please complete the fields below with the most up-to-date information about your beneficiary(ies). If you are designating more than one beneficiary, in order for this designation to be valid the total of the percentages allocated to each of your beneficiaries must be exactly 100%. If you wish to designate more than four beneficiaries, attach a separate page that covers the requested information relating to the additional beneficiary(ies).

Remember: You can only designate your pension partner as a beneficiary in very specific circumstances. Please ensure you review the relevant instructions in Sections 1, 2 & 4 before listing your pension partner as a beneficiary. The percentages must equal 100%. For example, if dividing equally amongst three beneficiaries, the allocation would be 33, 33, and 34%.

I designate the beneficiary(ies)* of my MEPP pension entitlement as follows:

Beneficiary #1				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or Same address as Part I			Phone number(s)	
Minor child	Trustee name and phone number			
Represented adult				

[CONTINUED ON NEXT PAGE]

Personal information on this form is collected under the authority of section 9.2 of the Alberta *Public Sector Pension Plans Act* and section 33 of the Alberta *Freedom of Information and Protection of Privacy Act* for pension administration purposes. If you have any questions regarding the collection of this information, contact the Member Services Centre at 1-877-889-MEPP (6377), or write to: 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9.



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Beneficiary #2				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or Same address as Part I			Phone number(s)	
Minor child	Trustee name and phone number			
Represented adult				

Beneficiary #3				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or Same address as Part I			Phone number(s)	
Minor child	Trustee name and phone number			
Represented adult				

Beneficiary #4				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or Same address as Part I			Phone number(s)	
Minor child	Trustee name and phone number			
Represented adult				

Total = 100%

PART IV – YOUR SIGNATURE

Instruction: This designation is an official record that must be signed and dated in order to be valid. Please sign and date below and keep a copy for your records.

By signing this form:

- I understand that if I am predeceased by one or more of the beneficiaries I have named, any benefit that would have been payable to them will be divided among the remaining beneficiary(ies).
- I confirm that the information on this form and its attachments, if any, is to the best of my knowledge and belief, complete and accurate.

Signature

Date (YYYY/MM/DD)

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