

Appointment of trustee for a minor beneficiary form



Return the completed form to:
Sun Life Financial, Group Retirement Service
☐ Waterloo: PO Box 2025 Stn Waterloo, Waterloo ON N2J 0B4
☐ Montreal: PO Box 11001 Stn CV, Montreal QC H3C 3P3

Please PRINT clearly. Nota : La version française de ce document est également disponible.

1 Plan sponsor information

| | | | |
|----------------------|------------------------|------|-------------------------------|
| Name of plan sponsor | Client ID C0 | Plan | Contract number - G |
|----------------------|------------------------|------|-------------------------------|

2 Personal information

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

| | | |
|--------------------------|----------------|----------------------------|
| First name | Middle initial | Last name |
| Social insurance number* | Account number | Telephone number (day) |
| Email address | | Telephone number (evening) |

3 Appointment of trustee for a minor beneficiary (not valid in the province of Quebec)

| | | |
|---------------------------------|----------------|-----------|
| First name of minor beneficiary | Middle initial | Last name |
| | | |
| | | |
| | | |

Note: the Trustee may have to account for its administration to the Public Trustee.

Any amount payable to a minor beneficiary during his/her minority will be paid to the individual named hereunder, as Trustee for the minor child.

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

Payment to the Trustee shall discharge Sun Life Financial. Sun Life Financial cannot be responsible for the effect or sufficiency of the appointment.

4 Your authorization

| | |
|---------------------|-------------------|
| Your signature X | Date (dd-mm-yyyy) |
|---------------------|-------------------|

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.