

15 York Street, 2nd Floor Toronto, ON M5J 0A3 Canada  
 Phone: 1.877.310.1088 Fax: 416.288.8611

NOT FOR USE BY PERSONS DOMICILED IN THE PROVINCE OF QUEBEC.

**Type of account**

<input type="checkbox"/> RRSP	<input type="checkbox"/> RRIF	<input type="checkbox"/> TFSA	<input type="checkbox"/> LIF	<input type="checkbox"/> RLSP
<input type="checkbox"/> LIRA	<input type="checkbox"/> PRIF	<input type="checkbox"/> LRIF	<input type="checkbox"/> RLIF	<input type="checkbox"/> FHSA

**Account Holder Information**

<input type="checkbox"/> Mr.					
<input type="checkbox"/> Mrs.				Mandatory	
Last name		First name & initials		Social Insurance Number	
				(mm/dd/yyyy)	
Home Address			Apt.	Birth Date	
City		Province	Postal Code	Home Phone Number	Business Phone Number

This beneficiary designation form is to apply to the above identified registered plan (the "Registered Plan") and will apply to all assets held under the Registered Plan. (Provide only one account number and check only one account type box. Should you wish to designate beneficiaries for more than one account, a separate form for each account is required.)

**Successor Annuitant / Designation of Beneficiary**

I understand that I am solely responsible for ensuring that the designation below is legally valid.  
 I have received a copy of the Declaration of Trust of the Registered Plan and I am familiar with the contents thereof.  
 I hereby revoke any previous designations of beneficiary made by me for this Registered Plan and, subject to the Notes set out below, I hereby: **(check one or both)**

elect to have my spouse or common-law partner, if he or she survives me and remains my spouse or common-law partner at the time of my death, become the successor annuitant of my RRIF or the successor holder of my TFSA or FHSA, upon my death **(only applicable to RRIF, TFSA and FHSA accounts):**

\_\_\_\_\_  
 Name of successor holder/beneficiary in full

\_\_\_\_\_  
 Successor holder/beneficiary's Social Insurance Number

\_\_\_\_\_  
 Address of successor holder / beneficiary

designate the person(s) named below, if then living, as beneficiary to receive the proceeds payable under the Registered Plan upon my death.

1.	_____ Name of beneficiary in full	_____ Relationship to Account Holder
	_____ Social Insurance Number (required)	_____ Percent Payable
2.	_____ Name of beneficiary in full	_____ Relationship to Account Holder
	_____ Social Insurance Number (required)	_____ Percent Payable
3.	_____ Name of beneficiary in full	_____ Relationship to Account Holder
	_____ Social Insurance Number (required)	_____ Percent Payable

**Account Holder's Signature**

Dated at \_\_\_\_\_ province of \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

\_\_\_\_\_  
 Holder's Signature

\_\_\_\_\_  
 Name of Witness (print). Must not be related to Beneficiary

\_\_\_\_\_  
 Signature of Witness

**Accepted on behalf of TSX Trust Company by its Agent,  
 CI Investment Services Inc.**

  
 \_\_\_\_\_  
 Authorized Signature of Agent

\_\_\_\_\_  
 Date

15 York Street, 2nd Floor Toronto, ON M5J 0A3 Canada  
Phone: 1.877.310.1088 Fax: 416.288.8611

**NOTES:**

**CAUTION:** i) In certain provinces, a beneficiary designation or any revocation thereof may be made only by a will and accordingly a beneficiary designation made herein may not be valid. Your beneficiary designation may not automatically change as a result of your future marriage or marriage breakdown. ii) Electronic beneficiary designations may be accepted but may not be legally valid/ enforceable/honoured, and if providing a beneficiary designation electronically you are strongly encouraged to also provide such beneficiary designation in ink. It is your sole responsibility to ensure that the beneficiary designation is effective and changed when appropriate.

**QUEBEC:** Any beneficiary or successor annuitant/holder designations made using this form by a person domiciled in Quebec, either at the time of execution or at the time of their death, may not be honoured and the assets of the Registered Plan may be payable to the estate of the deceased.

**SUCCESSOR vs. BENEFICIARY(IES):** If (i) you have designated both a successor annuitant/holder and one or more beneficiary(ies) above, (i i) your designated successor annuitant/holder remains your spouse or common-law partner, and (iii) both are alive at your death, then the designation of a successor annuitant/holder takes precedence.

**MULTIPLE BENEFICIARIES:** You must ensure that the percentage numbers you may fill in above total to 100 percent. If they do not, all listed beneficiaries will be deemed to have been designated with an equal percentage. If a beneficiary you have designated dies before you, that beneficiary's percentage entitlement will be paid to your estate.

**GOVERNING LAW:** If you are domiciled in Canada when you die, this form will be governed by the laws of your province/territory of domicile at that time. If you are not, the laws of your Canadian province/territory of domicile at the time of execution of this form will apply. Otherwise, the laws of Ontario will apply.

**CI Financial Corp. Privacy Office  
Canadian  
Subsequent Collection Form Standard Privacy Notice**

CI Investment Services Inc. ("CIIS", "we", "our", "us") requires personal information to administer and provide services associated with your account ("Account Services"). We use the personal information collected on this form to provide the products and services you have requested, improve our products and services, and fulfill our legal and regulatory obligations. Additional privacy terms apply to use of our online services and certain other services. We are not responsible for Third Party Providers such as your financial advisor and their dealership, who process personal information in accordance with their own terms. We share your personal information with CI Financial company affiliates and their subsidiaries where necessary to administer and service your account. You have the right to request access to or correction of, or withdraw your consent to the processing of, your personal information. For more information, including with respect to our use of service providers outside of Canada or your province of residence, please contact our Privacy Officer or see the CIIS's Privacy Policy at <https://www.cifinancial.com/ci-is/ca/en/privacy.html>.