

Beneficiary Information

If you have not yet commenced a benefit, use this form to register or update your beneficiary information. Please review the definition of spouse and other relevant information on the reverse, and complete all mandatory sections. You must sign and date the form. The fully completed legible form with original signatures must be received by the Pension Office in order to take effect. If it is defective in any way, the last valid form on file remains in effect.

SECTION 1 – Member Information (Mandatory)

Surname	Given Name(s)	Social Insurance Number	Employee or Pension ID#
Home Address		Telephone (with area code)	
		Email (to receive a confirmation of change)	

SECTION 2 – Spousal Declaration (Mandatory)

Your spouse is entitled to your survivor benefits, unless they complete a spousal waiver - (BC) *Pension Benefits Standards Act (PBSA)* prescribed FORM 4.

I certify, at the time of authorizing this form, based on the definition of spouse (legal, common-law or same sex) (check one ✓),

- I have a spouse (complete information below)
- I do NOT have a spouse as defined under the *PBSA* and the pension plan (see reverse) – **GO TO SECTION 3**

Spouse's Information

Surname	Given Name(s)	Social Insurance Number	Date of Birth (DD-MMM-YYYY)
---------	---------------	-------------------------	-----------------------------

Alternate Beneficiary - in the event you no longer have a spouse at your date of death (i.e. spouse predeceases you, marital breakdown or relationship ends) and you have not updated your beneficiary nominations (allocated in proportions of percentages which must be stated to two decimals and add to 100.00%). Entitlements for beneficiaries under age 19 are paid to the Public Trustee.

Full name & address (if room is limited, address may be provided on an attachment)	Relationship	Percentages	Social Insurance Number	Date of Birth (DD-MMM-YYYY)
Alternate #1				
Alternate #2				
Alternate #3				

SECTION 3 – Primary Beneficiary (Only complete if you do not have a spouse OR a waiver is attached or on file)

I do not have a spouse, or a spousal waiver is attached/already on file, and I designate the following as my primary beneficiary (check one ✓):

- My Estate (default if no spouse or waiver and no valid designation)
- The beneficiary(ies) listed below (an alternate beneficiary can be nominated to receive a benefit in the event that the beneficiary predeceases you and you have not updated your beneficiary nominations)

Full name & address (if room is limited, address may be provided on an attachment)	Relationship	Percentage	Social Insurance Number	Date of Birth (DD-MMM-YYYY)
Beneficiary #1				
Alternate Beneficiary #1				
Beneficiary #2				
Alternate Beneficiary #2				
Beneficiary #3				
Alternate Beneficiary #3				
Beneficiary #4				
Alternate Beneficiary #4				

Survivor benefits are allocated among all surviving beneficiaries in proportions of percentages, which must be stated to two decimals and add to 100.00%. Entitlements for beneficiaries under age 19 are paid to the Public Trustee.

SECTION 4 – Authorization by Member (Mandatory)

I hereby revoke any previous designation(s) I may have made and authorize the Pension Office to pay any survivor benefits in accordance with the information I have provided on this form. I understand that I must notify the Pension Office if I marry or establish a marriage-like relationship after filing this form, and my new spouse will become entitled to my survivor benefits, unless I file a new form and waiver.

Signature of Member	Date (DD-MMM-YYYY)
---------------------	--------------------

University of Victoria Money Purchase Pension Plan

Survivor Benefits

The survivor benefit for a member who dies before commencing a benefit, is the balance in the member's account(s).

Beneficiary

- Under the *Pension Benefits Standards Act (BC)* ("PBSA"), if you have a spouse, **your spouse is automatically** entitled to your survivor benefit. However, you can designate another beneficiary if your spouse has completed and filed a spousal waiver (PBSA prescribed *FORM4*) with the Pension Office.
- If your spouse has waived their entitlement to a pre-retirement survivor benefit, you cannot then name them as a non-spousal beneficiary.
- If you **do not have a spouse** (see definition), or your spouse has completed a waiver, the beneficiary is automatically your estate unless you have designated another beneficiary on this form.

Spouse (Definition)

Persons are spouses for the purposes of this Act on any date on which one of the following applies:

- (a) they
- (i) are married to each other, and
 - (ii) have not been living separate and apart from each other for a continuous period longer than 2 years;
- (b) they have been living with each other in a marriage-like relationship for a period of at least 2 years immediately preceding the date.

Other Important Information

A survivor or person with power of attorney or guardianship for property for the member cannot change a beneficiary, except as provided under the *Wills, Estates and Succession Act (BC)*.

If, after reading this form, you have questions regarding survivor benefits and beneficiary designations, contact the Pension Office at pensions@uvic.ca or (250) 721-7030.

Disclaimer

*The information provided on this form is based on plan rules and legislation, both of which are subject to change without notice. **The Plan document and applicable acts and regulations shall govern in the event of a question or dispute that may arise.***