

Dalhousie University Staff Pension Plan Spouse & Beneficiary Designation Form

Name (Print) : _____ Employee No.: _____

Identification of Spouse (check one box)

I certify that the following applies to me as of the date of signature below. The Administrator of the Dalhousie University Staff Pension Plan is directed to administer my pension entitlements in accordance with the indicated description of my spousal circumstances.

 I have a spouse, as defined by the applicable pension benefits legislation (see definition on page 2).

Spouse's name (First-Surname): _____ Date of birth: _____

 I do not have a spouse, as defined by the applicable pension benefits legislation (see definition on page 2).

Designation of Beneficiary

Subject to the terms of the Dalhousie University Staff Pension Plan and/or the provisions of the Pension Benefits Act, I hereby direct Dalhousie University to pay the applicable benefits as I have indicated herein. I understand that Dalhousie University will follow these directions unless prohibited by the terms of the Plan or Act by due process of law.

Surname	First Name	Date of Birth (dd-mm-yy)	Relationship to Employee	% of Available Benefits Payable	Mailing address
If minor beneficiary	Name of trustee			Relationship between trustee and minor beneficiary	
If minor beneficiary	Name of trustee			Relationship between trustee and minor beneficiary	
If minor beneficiary	Name of trustee			Relationship between trustee and minor beneficiary	

I understand that upon my death, my surviving spouse is entitled to a minimum pension benefit, and any balance remaining, if any, is payable to my designated beneficiary. If I have no surviving spouse, the benefits are payable to my designated beneficiary. In the absence of a designated beneficiary those benefits are payable to my estate. **If the beneficiary is a minor, please name a trustee.**

If you want any benefits to be paid to a trustee in trust for a beneficiary, or your beneficiary is a minor, please follow the instructions on page 2 of this form. If the terms of any such trust are contained in a separate document such as a Trust Agreement or a Will, provide details of that document here: _____.

If any of the above-named beneficiaries predeceases me, that beneficiary's share shall (check one):

- revert to my estate; or
 be divided equally among the surviving named beneficiaries.

I hereby revoke all previously designated beneficiary appointments with respect to the applicable pension benefits. I reserve the right to change my beneficiary designation(s) from time to time, subject to the provisions of any law or regulation governing the designation of beneficiaries. This designation shall be considered a written designation within the meaning and for purposes of the *Beneficiaries Designation Act*. **Please note an original signed document is required for update.**

Signature: _____

Date: _____

You may wish to obtain independent financial or legal advice to assist with decisions regarding appointing a designated beneficiary for pension plan purposes.

DEFINITIONS UNDER NOVA SCOTIA PENSION BENEFITS ACT

A “spouse” means either of two persons who

- (i) are married to each other,
- (ii) are married to each other by a marriage that is voidable and has not been annulled by a declaration of nullity,
- (iii) have gone through a form of marriage with each other, in good faith, that is void and are cohabiting or, where they have ceased to cohabit, have cohabited within the twelve-month period immediately preceding the date of entitlement,
- (iv) are domestic partners within the meaning of Section 52 of the Vital Statistics Act, or
- (v) not being married to each other, are cohabiting in a conjugal relationship with each other, and have done so continuously for at least
 - (A) three years, if either of them is married, or
 - (B) one year, if neither of them is married.

DESIGNATING BENEFITS TO A TRUSTEE

To designate a trustee to hold your benefits in trust for another person, we recommend that you consult with a legal advisor and with your proposed trustee. If the designated beneficiary is a minor, you must appoint a trustee to receive the benefit in trust for the minor until they attain the age of majority.

**Please return the original signed document to Retirement Services at:
Retirement Services, People and Culture
Dalhousie University
Henry Hicks Administration Building
6283 Alumni Cres, Room 150
PO Box 15000
Halifax, NS B3H 4R2**

Contact 902-494-1782 or pensions@dal.ca with any questions.