

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