

This form is to:

- A - Revoke a previous successor holder appointment under a group tax-free savings account, OR
- B - Appoint a new successor holder

If you wish to designate a beneficiary, use *Designation of revocable beneficiary/trustee appointment* form.

Please print.

EMPLOYER/PLAN SPONSOR INFORMATION			
Name of employer/plan sponsor ENGINEERS CANADA			Policy/plan number 35408
HOLDER/MEMBER INFORMATION			
Last name	Initial	First name	Certificate/social insurance number

Complete either section A or section B

A – TO REVOKE A PREVIOUS SUCCESSOR HOLDER/SUCCESSOR MEMBER

- I revoke the previous successor holder appointment under the group tax-free savings account.

B – TO APPOINT A SUCCESSOR HOLDER/SUCCESSOR MEMBER

- I revoke the previous successor holder appointment and appoint my spouse or common-law partner indicated below (if living and still my spouse or common-law partner at the time of my death) to become the successor holder of the group tax-free savings account in the event of my death and acquire all rights as the holder thereof. I reserve the right to revoke this appointment.

Spouse or common-law partner's			Social insurance number	Date of birth
Last name	Middle initial	First name		
			<input type="checkbox"/> Male <input type="checkbox"/> Female	- - yyyy mm dd

Note: if you've appointed a successor holder, that individual becomes the holder upon your death and therefore doesn't need to be named as your beneficiary. Another person(s) may be designated as the beneficiary to receive the proceeds upon your death if the successor holder predeceases you or no longer qualifies as your spouse or common-law partner at the time of your death. If you have appointed a successor holder, an irrevocable beneficiary cannot be designated.

SIGNATURES

Signed at _____		_____
City	Province	Date
Signature of holder/member		Signature of witness (person who is not named as successor holder)