



# BENEFICIARY & SPOUSE DESIGNATION FORM (INCLUDING NAME CHANGE)

## MEMBER INFORMATION

Last name: \_\_\_\_\_ First name: \_\_\_\_\_ Initial: \_\_\_\_\_  
 Employee Division/Location: \_\_\_\_\_ Employee Date of Birth (mm/dd/yyyy): \_\_\_\_\_  
 Employee Number: \_\_\_\_\_ Gender:  Male  Female

## SPOUSE DESIGNATION

I certify that as of the date of this declaration, I DO  I DO NOT  have a Spouse as defined under Nova Scotia pension legislation (see reverse for definition of eligible Spouse).

Spouse's Last name: \_\_\_\_\_ First name: \_\_\_\_\_ Initial: \_\_\_\_\_  
 Spouse's Date of Birth (mm/dd/yyyy): \_\_\_\_\_ Gender:  Male  Female

Date of Marriage, Domestic Partnership or Conjugal (marriage like) Relationship (mm/dd/yyyy): \_\_\_\_\_

If the person you are designating as your Spouse no longer qualifies as your Spouse in the future, due to changes in your personal circumstances or changes to Nova Scotia pension legislation, you should notify the HRM Pension Plan office as soon as possible.

Verification with respect to who qualifies as your Spouse will be done at the time of your retirement or death, and that verification will depend on Nova Scotia pension legislation and the applicable provisions of the HRM Pension Plan.

If a portion of your pension has been assigned to a former spouse due to marriage breakdown, or a court order or separation agreement states that a former spouse is not entitled to your pension benefits, it is very important that you provide a copy of the document to the plan administrator.

Signature of Member: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Signature of Witness: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

(other than eligible spouse)

## BENEFICIARY DESIGNATION

In accordance with the terms and conditions of the Plan and pension legislation, your spouse is entitled to certain benefits following your death regardless of any beneficiary you have designated. For exceptions, please see the information regarding pre-retirement death benefits on the reverse side of this form. Benefits not payable to your spouse will be paid to your designated beneficiary. If you are designating a beneficiary who is a minor, please designate a trustee. A trust agreement or guardian appointment is required to make a payment to a minor beneficiary in trust.

I hereby designate the following beneficiary(ies) to receive any such amount payable from the Plan, in the event of my death:

Last Name	First Name	Date of Birth (mm/dd/yyyy)	Relationship to Member	% of Benefit Allocated	Member Initials	Name of Trustee (if applicable)

By signing this form, I revoke any previous beneficiary designations made by me related to my pension plan benefits. I reserve the right to revoke my beneficiary and hereby acknowledge that all designations remain in effect until they are revoked in writing by me and received by my employer or pension plan administrator. If you do not specify the percentage to be allocated to each beneficiary, the death benefit will be divided equally. If a beneficiary predeceases you, the deceased beneficiary's share will be equally divided among the surviving beneficiaries.

Signature of Member: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Signature of Witness: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

## NAME CHANGE

I declare that my name has changed as follows. Please update all Plan records accordingly.

New Last name: \_\_\_\_\_ New First name: \_\_\_\_\_ Initial: \_\_\_\_\_

Signature of Member: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

Please mail completed form to the Halifax Regional Centre for Education, 33 Spectacle Lake Drive, Dartmouth, NS B3B 1X7. Call 1-902-490-6213 or toll-free at 1-888-490-6213 with any questions.

## DEFINITION OF SPOUSE UNDER NOVA SCOTIA PENSION BENEFITS LEGISLATION

**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

Under the above definition, it is possible that more than one person qualifies as your spouse on the date of your retirement. If this situation occurs, before the date of your retirement you must take the necessary measures so that only one of them is eligible for the benefit payable on your death and that person can be identified on your date of retirement.

### Pre-Retirement Death Benefits

If a member, who is entitled to a deferred pension, dies prior to pension commencement, his/her eligible spouse<sup>1</sup> is entitled to receive certain death benefits payable under the pension plan. For your spouse to be eligible to receive a benefit following your death, the person must not have waived the death benefit and there must not be a written agreement or court decision that removes the right to the benefit.

In Nova Scotia, the spouse of a member can waive his/her entitlement to pre-retirement death benefits by delivering a written waiver before the member's death, in the prescribed form, to the plan administrator. A person who has signed such a waiver can cancel it by delivering a written and signed notice of cancellation before the member's death.

**CAUTION REGARDING WAIVERS: Members and their spouses are strongly encouraged to review, in advance of signing a waiver, the potential adverse consequences that will result in respect of the spouse. In particular, members and their spouses should consider that where a waiver is completed and submitted, the spouse will not receive any death benefits upon the member's death.**

**If a member has no eligible spouse or the spouse has signed the required waiver form, death benefits will become payable to the beneficiary designated in the Beneficiary Designation section on the front side of this form. Where a member has not designated any beneficiary, the death benefits will become payable to the estate of the member.**

<sup>1</sup> Marriage/relationship breakdown/separation may affect the eligibility of a spouse for pre-retirement death benefits.