



Removal or appointment of successor holder for a Tax-Free Savings Account



Return to Canada Life, Group Retirement Services
255 Dufferin Avenue, T540, London, ON N6A 4K1

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

To designate a beneficiary, use *Designation of revocable beneficiary/trustee appointment* form.

EMPLOYER/PLAN SPONSOR

Name of employer/plan sponsor ENGINEERS CANADA	Policy/plan number 35408
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HOLDER/MEMBER

Last name	Initial	First name	Certificate 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:

Spouse or common-law partner's Last name	Middle initial	First name	Social insurance number - -	Date of birth yyyy mm dd

to become the successor holder of the group tax-free savings account in the event of my death and acquire all rights I have as holder instead of a lump sum death benefit. I understand that, if I have appointed my spouse or common-law partner as successor holder, a beneficiary designation will be effective only if the successor holder dies before me or is not my spouse or common-law partner at the date of my death. If I have appointed a successor holder, an irrevocable beneficiary cannot be designated.

SIGNATURES

Signed at _____ <div style="display: flex; justify-content: space-between; margin-top: 10px;"> City Province </div>	_____ Date
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Signature of holder/member

Signature of witness (person who is not named as successor holder)

Contact information 1-800-724-3402 or grsaccess.com
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