

Designation of Beneficiary and / or Appointment of Successor Annuitant / Holder



RSP RIF TFSA (Not valid for Quebec)

If you would like to designate a Beneficiary to your Account, you may do so by providing the information requested below. Please note, however, that the designation of a Beneficiary to an Account is subject to applicable law. You may wish to discuss this designation with your legal advisor. If no Beneficiary is designated, all amounts under your Account will be payable to your estate and distributed in accordance with applicable law.

Manitoba Residents: Your designation of a Beneficiary by means of a designation form will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your Beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation.

Quebec residents: Beneficiary designation for an applicant who is a resident of Quebec can only be made by way of a will or marriage contract. This designation represents an appointment of Successor Annuitant / Holder. This appointment will only be recognized where your spouse is the sole residual beneficiary of your Estate.

Note: Faxed forms are not valid.

Please send completed form to ING Direct Funds Limited, 111 Gordon Baker Road, Toronto, Ontario M2H 3R1.

Annuitant / Holder Information

MR. MRS. MS. MISS DR.

First Name: _____ INITIAL _____

Last Name: _____

Address: _____ UNIT _____ STREET _____

_____ CITY _____ PROVINCE _____ POSTAL CODE _____

Home Telephone: _____ Business Telephone: _____ Ext: _____

E-mail: _____

If known, please tell us your Client Number and the Account number for which you wish to designate or change a Beneficiary. This information is necessary in order to identify the applicable Account.

Client Number: _____ Account Number: _____

Complete this section to designate a Beneficiary.

I designate the person below as Beneficiary. All amounts under this Account will be payable to this surviving Beneficiary in the event of my death.

Note: If RIF or TFSA: Where the sole primary Beneficiary is my spouse, this designation also stands as a Successor Annuitant / Holder appointment, whereby the original RIF/TFSA Account continues in my spouse's name.

_____ FIRST NAME _____ INITIAL _____ LAST NAME _____

Relationship: _____ SIN: _____

- a) I hereby revoke any prior designation made by me with respect to this Account;
- b) The Beneficiary designated herein must survive me and accept this designation in order to receive the amounts payable for this Account. If no Beneficiary designated herein survives me or accepts this designation, the proceeds of this Account shall be payable to my estate and distributed in accordance with applicable law;
- c) If funds contained in this contract are subject to pension legislation, the addendum governing such funds may override this designation if a person other than my spouse (or other individual who has been given similar rights under the applicable pension jurisdiction) is designated to receive the proceeds;
- d) My estate may be responsible for reporting and paying income tax on proceeds paid to a designated Beneficiary;
- e) Designations are created and governed under provincial legislation. The provincial legislation may override this designation.

Signature of the Annuitant / Holder: X _____ **Date:** _____
D D / M M / Y Y

Witness Signature: X _____ **Date:** _____
D D / M M / Y Y