

## SECTION 1: GENERAL INFORMATION

\*Required information

Plan Sponsor Name\*

Open Access® Account Number

Plan Type\*

- ☐ RRSP ☐ Spousal RRSP ☐ Non-Registered  
☐ DPSP ☐ Pension Plan ☐ Other:

Change Effective Date\*

Y Y Y Y / M M / D D

Surname\*

First Name and Initial\*

- ☐ Mr. ☐ Mrs.  
☐ Ms

Address\*

City\*

Province\*

Postal Code\*

Daytime Phone Number\*

Email

S.I.N.\*

## SECTION 2: DESIGNATION OF BENEFICIARY

I designate the person(s) named below as my beneficiary(ies) under this plan\*

Name of beneficiary in full (1)

Relationship to Applicant (1)

Address of beneficiary (1)

Name of beneficiary in full (2)

Relationship to Applicant (2)

Address of beneficiary (2)

Please note:

- Not applicable in Quebec or PEI. In certain provinces, designation of beneficiary can only be made by including a specific clause in your will.
- FOR MANITOBA: Your designation of 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 have to do so by means of a new designation.

## SECTION 3: CHANGE OF NAME

New Surname\*

New First Name and Initial\*

Reason for Change

- ☐ Marriage ☐ Divorce ☐ Correction ☐ Other (please specify) \_\_\_\_\_

We require a copy of the legal documentation to accompany this form.

## SECTION 4: BANKING INFORMATION

For Banking Changes related to a pre-authorized withdrawal, Please complete a PRE-AUTHORIZED CHEQUING AGREEMENT (PAC) form. This form is available at: [www.openaccessltd.com](http://www.openaccessltd.com)

## SECTION 5: AUTHORIZATION

Date\*

Y Y Y Y / M M / D D

Signature of Account Owner\*