



Pension Partner and Beneficiary Designation

See important information attached to this form.
Please print clearly and review the information you provide is complete and accurate.

Section 1 Member Information

First name		Middle initial	Last name	
Date of birth (dd-mm-yyyy) _ _		Social Insurance Number		
Address (street number and name)			Apartment or suite	
City	Province	Postal code	Telephone number (day) _ _	
E-mail address			Telephone number (evening) _ _	

Section 2 Pension Partner Information

- I do not currently have a Pension Partner**
- The person named below is my Pension Partner**

First name		Middle initial	Last name	
Date of birth (dd-mm-yyyy) _ _		<input type="checkbox"/> Female <input type="checkbox"/> Male		
Address (street number and name)				Apartment or suite
City	Province	Postal code	Telephone number (day) _ _	
E-mail address			Telephone number (evening) _ _	

(If address is different)

- Delete Pension Partner Information:**
I no longer have a Pension Partner due to:
 - Death
 - Living separate and apart
 - Common-law relationship dissolved
 - Divorce
- Effective date of change
- | | | |
|------|----|----|
| | | |
| YYYY | MM | DD |

Section 3**Beneficiary Designation**

First name/Las Name or Name of Organization			Date of birth (dd-mm-yyyy)
Relationship	Telephone number	E-mail address	
Address (street number and name)			Apartment or suite
City	Province	Postal code	% of Benefit

First name/Las Name or Name of Organization			Date of birth (dd-mm-yyyy)
Relationship	Telephone number	E-mail address	
Address (street number and name)			Apartment or suite
City	Province	Postal code	% of Benefit

First name/Las Name or Name of Organization			Date of birth (dd-mm-yyyy)
Relationship	Telephone number	E-mail address	
Address (street number and name)			Apartment or suite
City	Province	Postal code	% of Benefit

If more room is required, please attach another page.

TOTAL 100%

Section 4**Member Declaration**

By signing below, I confirm that the information on this form is, to the best of my knowledge and belief, complete and accurate. I understand that the above designation will cancel and replace any previous designation I may have filled with APEX.

Signature

Date (dd-mm-yyyy)

Please complete and return to:

Retirement Services
300-8616 51 Avenue
Edmonton, AB T6E 6E6
Retirement@auma.ca



Frequently Asked Questions

Definition of Pension Partner

Pension Partner means

- i. A person who, at the relevant time, was married to that other person and had not been living separate and apart from that person for a continuous period of 3 or years, or
- ii. If there is no person to whom subclause (i) applies, a person who, immediately preceding the relevant time, had lived with that person in a conjugal relationship
 - A. for a continuous period of at least 3 years or
 - B. of some permanence, if there is a child of the relationship by birth or adoption.

When to use this form

This form is to be used to:

- Update beneficiary information
- Update information about your Pension Partner before retirement

Can I designate my Pension Partner as my beneficiary?

By law, your Pension Partner is required to receive 100% of any pre-retirement survivor benefits or at least 60% of post-retirement survivor benefits. However, if your pension partner has waived his/her rights to these benefits, then you can designate your Pension Partner as your beneficiary to receive any remaining benefits. Keep in mind that your pension partner can revoke their signed waiver at any time.

Who can I designate as my Beneficiary?

You can designate any person(s), organization(s) or your estate as your beneficiary.

- If you are naming a dependent minor child, you may want to name a trustee on behalf of the child.
- If you name your estate as your beneficiary, your death benefits would ultimately be subject to the claims of creditors.

What happens if I do not designate a beneficiary?

If you **do not** have a pension partner and you do not designate a beneficiary, then any benefits payable when you pass away will be paid to your estate.

If you have a pension partner, any survivor benefits will be paid automatically to your pension partner.

What if I name a beneficiary in my Will?

It may invalidate this designation of a beneficiary. If you choose to designate a beneficiary in your Will instead of this form, please make sure your pension plan is named.