



Designation of Beneficiary(ies)

The Members of the Legislative Assembly Pension Plan (MLAPP) encourages updating your beneficiary information directly online.

This quick, convenient and secure method will save you time and can be used to manage your pension information.

Registration is easy! Go to www.mlapp.apsc.ca and click Login in the top right corner.

Alternatively, please review the important information on this form before filling in the relevant parts.

Please send the completed, signed and dated form to:

MLAPP, c/o Alberta Pensions Services Corporation (APS)

5103 Windermere Blvd. SW Edmonton, AB T6W 0S9

Fax: 780-421-1652

How to use this form:

I am:	I need to read:	I need to complete:
A retired member (about to receive or receiving a pension)	Sections 1, 3, 4, 5	Part I, II, III
A surviving pension partner, an ex-pension partner, or a beneficiary	Sections 2, 4, 5	Part I, II, III

SECTION 1: YOU ARE A RETIRED MEMBER

Use this form to designate the beneficiary(ies) who will receive a death benefit if you die after starting to receive a pension if you selected a form of pension with a guaranteed period, and the guaranteed period has not expired. Keep in mind that the beneficiary(ies) you designated while an active or deferred member will still be applicable if you do not make any new designations prior to your death.

Do not list your pension partner as a beneficiary in Part II unless your pension partner waived their right to a survivor pension, and you wish to name them as a beneficiary for a Single Lifetime pension option. For your reference, a description of the term 'pension partner' is provided in Section 3.

If you selected the Normal Form pension option, a survivor pension is payable to a person who, at the time of you die, satisfies the definition of pension partner and who had been married to you for at least 5 years prior to the time you die, or who had lived with you for at least 5 years prior to the time you die. You should not use this form to designate beneficiary(ies) as the Normal Form pension option has no guaranteed period.

If you selected a Joint Lifetime pension option, any death benefit will be paid to the pension partner you had at retirement. You should not use this form to designate beneficiary(ies) as the Joint Lifetime pension option has no guaranteed period.

If you selected a Single Lifetime pension option, and there is time left in the guaranteed period associated with your pension option, the death benefit will be paid to your beneficiary(ies), or if you have not designated any, to your estate. If your pension partner had waived their rights they may be listed as a beneficiary in Part II.

You should not designate any beneficiary(ies) if:

- You are a retired member who selected a form of pension with no guaranteed period, or the applicable guaranteed period has already expired.



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SECTION 2: YOU ARE A SURVIVING PENSION PARTNER, AN EX-PENSION PARTNER, OR A BENEFICIARY

Use this form to designate the beneficiary(ies) who will receive a death benefit if you die after commencing to receive a pension benefit and there is time left in the guaranteed period associated with the pension benefit you are receiving. If you do not designate any beneficiary(ies), the death benefit will be paid to your estate.

- **Pension partners and ex-pension partners:** If there is no guaranteed period associated with the pension benefit you are receiving, or if the applicable guaranteed period has expired, you should not designate any beneficiary(ies).

SECTION 3: DETERMINING IF YOU HAVE A PENSION PARTNER

“Pension partner” means

- (i) a person who, at the relevant time, was married to an officer or former officer, and
 - (A) was not judicially or otherwise separated from him or her, or
 - (B) if so separated, was wholly or substantially dependent on him or her,
- (ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with the officer or former officer 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,and was, during that period or that relationship, as the case may be, held out by the officer or former officer in the community in which they lived as being in that conjugal relationship, or
- (iii) if there is no person to whom subclause (i) or (ii) applies, a person who was married to but separated from the officer or former officer and not wholly or substantially dependent on him or her at the relevant time.

Remember: You can only designate your pension partner as a beneficiary in very specific circumstances. Please ensure you review the relevant instructions provided in Section 1 or 2, as applicable, to determine if you can list your pension partner as a beneficiary in Part III.

SECTION 4: DESIGNATING A MINOR CHILD, REPRESENTED ADULT, A CHARITY, OR YOUR ESTATE AS YOUR BENEFICIARY

If you are designating a minor child, represented adult, a charity, or your estate as your beneficiary, please review the relevant content below before completing Part III.

- **Minor child:** If you would like to designate a minor who is under 18 years of age as your beneficiary, we recommend you name an adult over the age of 18 as trustee. Please complete the applicable fields in Part III indicating that the beneficiary is a minor and provide the full name of the trustee. If you do not name a trustee, the default trustee for any minor beneficiary will be the public trustee.
- **Represented adult:** If there is a trusteeship order, please complete the applicable fields in Part III indicating the trustee and provide the full name of the trustee.
- **Charity:** If you would like to designate a charitable organization as your beneficiary, please complete the relevant fields in Part III with the full name and charitable organization number. Do not list a specific person associated with the charitable organization.
- **Estate:** If you would like to designate your estate as your beneficiary, please write “estate” instead of a person’s name in the relevant field in Part III. Please note that if you designate your estate as your beneficiary, the amount payable to your estate will be subject to the claims of creditors, if applicable.

SECTION 5: LEGAL INFORMATION

You may wish to obtain legal and financial advice when estate planning.

Any future beneficiary designations, including those in a Will, may invalidate this designation of beneficiary(ies). If you choose to designate the beneficiary(ies) of any MLAPP benefit entitlement using your Will instead of this form, please make sure the designation relates to your MLAPP benefit.

For more information about designating beneficiaries, please visit www.mlapp.apsc.ca or contact the Member Services Centre at 1-877-422-4748.



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PART I – YOUR PERSONAL INFORMATION

My personal information is as follows:

_____	_____
Last name	First name and initials

Full mailing address	

_____	_____
Phone number(s) (including area code)	MLAPP identifier number or social insurance number

PART II – YOUR BENEFICIARY(IES) INFORMATION

Instruction: Please complete the fields below with the most up-to-date information about your beneficiary(ies). If you are designating more than one beneficiary, in order for this designation to be valid the total of the percentages allocated to each of your beneficiaries must be exactly 100%. If you wish to designate more than four beneficiaries, attach a separate page that covers the requested information relating to the additional beneficiary(ies).

Remember: You can only designate your pension partner as a beneficiary in very specific circumstances. Please ensure you review the relevant instructions in Sections 1, 2 & 4 before listing your pension partner as a beneficiary. The percentages must equal 100%. For example, if dividing equally amongst three beneficiaries, the allocation would be 33, 33, and 34%.

I designate the beneficiary(ies)* of my pension entitlement as follows:

Beneficiary #1				
_____	_____	_____	_____	_____
First name	Middle initial	Last name	Relationship	% of benefit
_____			_____	
Full mailing address or <input type="checkbox"/> Same address as Part I			Phone number(s)	
<input type="checkbox"/> Minor child	_____			
<input type="checkbox"/> Represented adult	Trustee name and phone number			

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Designation of Beneficiary(ies)

Beneficiary #2				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or <input type="checkbox"/> Same address as Part I			Phone number(s)	
<input type="checkbox"/> Minor child	Trustee name and phone number			
<input type="checkbox"/> Represented adult				

Beneficiary #3				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or <input type="checkbox"/> Same address as Part I			Phone number(s)	
<input type="checkbox"/> Minor child	Trustee name and phone number			
<input type="checkbox"/> Represented adult				

Beneficiary #4				
First name	Middle initial	Last name	Relationship	% of benefit
Full mailing address or <input type="checkbox"/> Same address as Part I			Phone number(s)	
<input type="checkbox"/> Minor child	Trustee name and phone number			
<input type="checkbox"/> Represented adult				

Total = 100%

PART III – YOUR SIGNATURE

Instruction: This designation is an official record that must be signed and dated in order to be valid. Please sign and date below and keep a copy for your records.

By signing this form:

- I understand that if I am predeceased by one or more of the beneficiaries I have named, any benefit that would have been payable to them will be divided among the remaining beneficiary(ies).
- I confirm that the information on this form and its attachments, if any, is to the best of my knowledge and belief, complete and accurate.

Signature

Date (YYYY/MM/DD)

Personal information provided on this form is collected for pension administration purposes. It is collected under the authority of the Alberta *Freedom of Information and Protection of Privacy Act*, section 33. If you have any questions regarding the collection of this information, contact the Member Services Centre at 1-800-358-0840 or write to: 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9.