



# Application for membership in a group registered pension plan

Canada Life, Group Retirement Services

In this application, "you" and "your" refer to and "we," "us," and "our" refer to The Street North, Winnipeg, MB R3C 3A5. We

the person who is applying to become a member of the group registered pension plan (the plan), Canada Life Assurance Company, the issuer of the group annuity product for the plan, 100 Osborne can be contacted at 1-800-724-3402 or by visiting grsaccess.com.

## SECTION 1 - EMPLOYER/PLAN SPONSOR

Name of employer/plan sponsor	Policy/plan number
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## SECTION 2 - INFORMATION ABOUT YOU (please print)

Last name <b>OWEN</b>	Middle initial <b>A</b>	First name <b>DOLORES</b>	Division/subgroup	Identification/employee number
Social insurance number (SIN) <b>514-663-871</b>	Date of employment <b>2024 07 02</b> yyyy mm dd	Date of birth <b>1980 07 28</b> yyyy mm dd	Gender <input type="checkbox"/> Male <input checked="" type="checkbox"/> Female	Language <input checked="" type="checkbox"/> English <input type="checkbox"/> French
Last name of spouse/common-law partner		First name	Email address <b>dowen@ranlegal.on.ca</b> Required for online access and to email information about the plan or services connected with it	
Address (apt. no., street no., street)				

City <b>SIoux LOOKout</b>	Province <b>ON</b>	Postal code <b>P8T 1B9</b>
If the above address is a PO box, general delivery or rural route, also include the civic or street address below		
Address (apt. no., street no., street) <b>PO BOX 1473</b>	City <b>SIoux LOOKout</b>	Province <b>ON</b>
Telephone no. <b>807-214-3832</b>	Alternate telephone no.	Province of employment
Ext.		Date joined plan yyyy mm dd

Are you a connected person?  Yes\*  No \*Form T1007 must be filed by your employer with Canada Revenue Agency (the plan administrator can help determine whether you are a connected person).

## SECTION 3 - YOUR BENEFICIARY DESIGNATION

You can appoint one or more beneficiaries. Note: pension legislation or the terms of the plan may require payment of the death benefit to your qualifying spouse or common-law partner. All designations are revocable except in Quebec (see "Important: Quebec residents"). If you wish to designate an irrevocable beneficiary, complete the *Designation of irrevocable beneficiary form*.

### Primary beneficiary(ies) on your death

Last name	First name	Date of birth yyyy mm dd	Relationship of beneficiary to you				% of benefit
			Select box below OR		Specify under Other		
			Married	Quebec civil union spouse	Common-law partner	Other (child, friend, etc.)	
<b>SUGGASHIE</b>	<b>DORA</b>	<b>20080530</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>child</b>	<b>25%</b>
<b>OWEN</b>	<b>JAMIE</b>	<b>20061229</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>child</b>	<b>25%</b>
<b>SUGGASHIE-OWEN</b>	<b>LARA</b>	<b>20040609</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>child</b>	<b>25%</b>
<b>SUGGASHIE-OWEN</b>	<b>TRICSYLLA</b>	<b>20070930</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>child</b>	<b>25%</b>
							<b>Total 100%</b>

### Important: Quebec residents

If you appoint your married or civil union spouse as your beneficiary, they will be irrevocable (meaning you cannot change your beneficiary or perform certain transactions such as making withdrawals (where permitted) without their consent) unless you check the box below:  
I designate my married or civil union spouse revocably

- The death benefit will be paid to the tutor(s) of a beneficiary who is a minor (generally the parents) or the tutor or curator of a beneficiary who otherwise lacks legal capacity unless a formal trust has been established by will or separate contract (in which case, designate the trust as beneficiary in this section)

Unless the law requires otherwise, if one of your primary beneficiaries predeceases you, their share will be paid to the surviving primary beneficiaries in equal shares, or if there is no surviving primary beneficiary(ies), to your contingent beneficiary(ies) named below. If there is no contingent beneficiary(ies), the benefit will be paid to your estate.

**Contingent beneficiary(ies) on your death**

Last name	First name	Date of birth yyyy mm dd	Relationship to you	% of benefit
				Total 100%

**Application for membership in a group registered pension plan (continued)**

**SECTION 3 – YOUR BENEFICIARY DESIGNATION (continued)**

Trustee (to be completed if any of your beneficiaries are minors or otherwise lack legal capacity and do not reside in Quebec; do not complete if a formal trust exists)

Last name	First name	Trustee for (indicate beneficiary name)	Relationship of trustee to you
SUGGASHIE-OWEN	PRISCILLA		MOTHER
SUGGASHIE-OWEN	LARA		MOTHER

You authorize the trustee(s) named above 1) to receive benefits payable on behalf of any beneficiaries who are minors or otherwise lack legal capacity to give a valid discharge and 2) in their sole discretion, to use the benefits for the education or maintenance of the beneficiary and to exercise any right of the beneficiary under the plan. The trust will terminate once the beneficiary is both of age of majority and has capacity to give a valid discharge. Legal advice should be obtained prior to appointing a trustee. Payment to the trustee(s) discharges us to the extent of the payment.

**SECTION 4 – PAYROLL DEDUCTION AUTHORIZATION**

You authorize your employer to deduct the following from each pay:

- your required contributions under the provisions of the plan; 6 and,
- if permitted by the plan, additional voluntary contributions of 3. You reserve the right to alter or discontinue this option.

**SECTION 5 – YOUR INVESTMENT SELECTION**

Select investment(s) if your plan sponsor/plan administrator has given you the right to select investments for all or part of the contributions to the plan. If a selection is not made, contributions will be invested in the default investment.

Name of investment and/or code	Percentage	Name of investment and/or code	Percentage
	%		%
	%		%
	%		%
	%		%

Total allocation must equal 100%

**SECTION 6 – SIGNATURE**

You confirm the information on this form and will update it in the future as it changes. You are aware of the reasons the information covered by your authorizations and consents is needed, and the benefits of, and the risks of not, authorizing/consenting. You authorize and consent to us collecting, using, disclosing and retaining your personal information for the purposes outlined in the attached Protecting your personal information. This authorization and consent is given in accordance with applicable law and without limiting the authorizations and consents given elsewhere in this application.

Dennis Owen  
Signature of applicant

July 17 2024  
Date

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