

## Beneficiary and Spousal Designation

Please review the definitions of Spouse on the second page and complete the following steps to designate your beneficiary for your pension plan:

### STEP 1 – ENTER YOUR PERSONAL INFORMATION

Your Name \_\_\_\_\_ (last, first, initial)      Your Date of Birth \_\_\_\_\_ (yyyy mm dd)

Your Identification Number \_\_\_\_\_ (Social Insurance Number)      Your Employee Number \_\_\_\_\_ (Employee Number)

### STEP 2 – INDICATE YOUR REASON FOR DESIGNATION

Initial enrollment in the Canadian Blood Services Defined Contribution Pension Plan     Revision to an existing designation (you may be asked to provide additional information)

### STEP 3 – SPOUSAL DESIGNATION

I certify that, as of the date of this declaration, I have a Spouse, as defined by the applicable legislation. (See reverse for definitions)

Name of Spouse \_\_\_\_\_ (last, first, initial)      Your Spouse's Date of Birth \_\_\_\_\_ (yyyy mm dd)

I do not have a Spouse, as defined by the applicable legislation. (See reverse for definitions)

### STEP 4 – BENEFICIARY DESIGNATION

All pension benefits on death are payable to your Spouse. If your Spouse predeceases you or if you do not have a Spouse, all benefits on death are payable to your designated beneficiary, or, if there is no beneficiary on file, to your estate. If your beneficiary is under the age of majority according to your province of residence, you should consider consulting a lawyer for more information about naming a trustee.

**DO YOU LIVE IN ALBERTA, BRITISH COLUMBIA, ONTARIO, QUEBEC OR SASKATCHEWAN?**

Your Spouse may complete a Pre-retirement spousal waiver which will allow you to designate another beneficiary. Please visit the CBS Pension website at [cbs.hroffice.com](http://cbs.hroffice.com) or contact the Canadian Blood Services Pension Call Centre at 1-877-252-4442.

**DO YOU LIVE IN QUEBEC?**

If you live in Quebec, the designation of your Spouse as beneficiary is automatically irrevocable unless you make a revocable designation. An irrevocable designation means that your Spouse must consent in writing if you want to change your beneficiary.

**IF YOU LIVE IN QUEBEC AND NAMED YOUR SPOUSE AS A BENEFICIARY, CHECK ONE OF THE BOXES BELOW:**

- This designation is revocable. I can change it at any time without my Spouse's written consent.  
 This designation is irrevocable. I must have my Spouse's written consent to change my designation.

I hereby revoke any beneficiary previously designated, and subject to any overriding legal spousal rights, I appoint the following person(s) as revocable beneficiary (ies) of any payment under the terms of the pension plan that may fall due after my death.

Beneficiary name (last, first, initial)	Relationship	Percentage of benefits

\* If the allocation of proceeds is specified, the percentages must total 100%. If the allocation is not specified, death benefits will be divided equally among all beneficiaries.

### STEP 5- CERTIFICATION

I acknowledge that, regardless of my designation of beneficiary, the pension plan providers and/or provincial pension legislation may require certain death benefits to be paid to my Spouse, if there is one at date of death, and that any benefits not payable to my Spouse will be paid to my beneficiary.

I reserve the right to revoke this designation of my beneficiary at any time. I acknowledge that all designations remain in effect until they are revoked in writing and received by the plan administrator, subject to applicable legislation. I understand that despite the spousal designation above, my Spouse will be determined based on provincial law at the time of my death.

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness name and signature

\_\_\_\_\_  
Date

**Privacy of Information** - Canadian Blood Services (CBS) knows that confidentiality of personal information is important. The personal information you provide on this form is used and retained to administer your pension plan and comply with any legal and regulatory requirements. Any information you provide on this form or other information you provide for your pension plan may be provided to the pension plan administrator (Morneau Sobeco). Access to this information at CBS and at Morneau Sobeco will be limited to: staff at CBS and at Morneau Sobeco who, in the performance of their jobs, are involved in managing your pension information; persons to whom you have granted access; and, persons authorized by law. You have the right to request access to the personal information in your file, and if necessary, correct any inaccurate information. If you have questions or concerns about our privacy practices, please contact the CBS privacy office by email - [privacy@blood.ca](mailto:privacy@blood.ca) or by phone 1-613-739-2483, option 2.

Please return this form to: Canadian Blood Services, DC Administrative Services, c/o Morneau Sobeco, 895 Don Mills Road, Suite 700, One Morneau Sobeco Centre, Toronto, Ontario, M3C 1W3 or by fax at (416) 445-9948. If you have any questions about this Form, contact the Canadian Blood Services Pension Call Centre at 1-877-252-4442.

## Definitions of Spouse in Pension Legislation Based on the Province of the Member's Employment

If there is any conflict between the definitions given below and the provisions of the plan text, the provisions of the applicable pension legislation will govern in all cases. For family law purposes, the applicable legislation will be based on the province of residence.

### Alberta:

The legislation uses "pension partner" in lieu of "spouse."

"**Pension partner**" means, in relation to another person,

(i) a person who, at the relevant time, was married to that other person and had not been living separate and apart from that other person for 3 or more consecutive 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 other 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.

### Manitoba:

"**Spouse**" where used in relation to another spouse means the person who married to that other spouse and "spouses" means two persons who are married to each other.

"**Common-law partner**" of a member or former member means

(a) a person who, with the member or former member, registered a common-law relationship under section 13.1 of *The Vital Statistics Act*, or

(b) a person who, not being married to the member or former member, cohabited with him or her in a conjugal relationship

(i) for a period of at least three years, if either of them is married, or

(ii) for a period of at least one year, if neither of them is married

A common-law partner shall be considered to have survived a member or former member with whom he or she had a common-law relationship only if they were cohabiting with each other immediately before the death of the member or former member.

### Newfoundland and Labrador:

"**Spouse**" means a person who

(i) is married to the member or former member,

(ii) is married to the member or the former member by a marriage that is voidable and has not been voided by a judgment of nullity, or

(iii) has gone through a form of a marriage with the member or former member, in good faith, that is void and is cohabiting or has cohabited with the member or former member within the preceding year.

"**Cohabiting partner**",

(i) in relation to a member or former member who has a spouse, means a person who is not the spouse of the member or former member who has cohabited continuously with the member or former member in a conjugal relationship for not less than 3 years, or

(ii) in relation to a member or former member who does not have a spouse, means a person who has cohabited continuously with the member or former member in a conjugal relationship for not less than one year, and is cohabiting or has cohabited with the member or former member within the preceding year.

### Ontario:

"**Spouse**" means either of two persons who,

(a) are married to each other, or

(b) are not married to each other and are living together in a conjugal relationship,

(i) continuously for a period of not less than three years, or

(ii) in a relationship of some permanence, if they are the natural or adoptive parents of a child, both as defined in the *Family Law Act*.

### Yukon Territories, Northwest Territories, and Nunavut:

The federal pension legislation applies to these jurisdictions.

"**Spouse**", in relation to an individual, includes a person who is party to a void marriage with the individual.

"**Common-law partner**", in relation to an individual, means a person who is cohabiting with the individual in a conjugal relationship, having so cohabited for a period of at least one year. Where a member or former member has a spouse from whom they are separated and a common-law partner with whom they are cohabiting, a reference to a "spouse or common-law partner" in respect of that member or former member means the common-law partner.

### British Columbia:

"**Spouse**" means, in relation to another person,

(a) a person who at the relevant time was married to that other person, and who, if living separate and apart from that other person at the relevant time, did not live separate and apart from that other person for longer than the 2 year period immediately preceding the relevant time, or

(b) a person who was living and cohabiting with that other person in a marriage-like relationship, including a marriage-like relationship between persons of the same gender, and who had been living and cohabiting in that relationship for a period of at least 2 years immediately preceding the relevant time.

### New Brunswick:

"**Spouse**" means either of a man and a woman who

(a) are married to each other,

(b) are married to each other by a marriage that is voidable and has not been avoided by a declaration of nullity,

(c) have gone through a form of marriage with each other in good faith that is void and have cohabited within the preceding year, or

(d) not being married to each other, have cohabited

(i) continuously for a period of not less than three years in a conjugal relationship in which one person has been substantially dependent upon the other for support, or

(ii) in a relationship of some permanence where there is a child born of whom they are the natural parents, and have cohabited within the preceding year.

### Nova Scotia:

"**Spouse or a common-law partner**" means either of a man and woman who

(i) are married to each other,

(ii) are married to each other by a marriage that is voidable and has not been annulled by a declaration of nullity, or

(iii) have gone through a form of marriage with each other, in good faith, that is void and are cohabiting or, if they have ceased to cohabit, have cohabited within the twelve-month period immediately preceding the date of entitlement.

### Prince Edward Island

Prince Edward Island has not enacted pension legislation. The Canadian Blood Services Defined Benefit Pension Plan states:

"**Spouse**", in relation to a Prince Edward Island Member, means persons who, at the relevant time:

(a) are married to each other;

(b) are married to each other by a marriage that is voidable and has not been annulled by a declaration of nullity;

(c) have gone through a form of marriage with each other, in good faith that is void and are cohabiting or, if they have ceased to cohabit, have cohabited within the year preceding the relevant time; or

(d) not being married to each other and neither being married to another person have lived together in a conjugal relationship for three years and are living together at the relevant time.

### Quebec:

The spouse of a member is the person who,

on the day of reference defined in the second paragraph,

(1) is married to or in a civil union with the member;

(2) has been living in a conjugal relationship with a member who is neither married nor in a civil union, whether the person is of the opposite or the same sex, for a period of not less than three years, or for a period of not less than one year if

• at least one child is born, or to be born, of their union;

• they have adopted, jointly, at least one child while living together in a conjugal relationship; or

• one of them has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

### Saskatchewan:

"**Spouse**" means:

(i) a person who is married to a member or former member; or

(ii) if a member or former member is not married, a person with whom the member or former member is cohabiting as spouses at the relevant time and who has been cohabiting continuously with the member or former member as his or her spouse for at least one year prior to the relevant time.