

Please print clearly in the blank boxes.

- Name change
 Beneficiary change
 Address change

Change form Group Tax-Free Savings Account (TFSA)

Send your completed form to:
Manulife Financial
Attn: GSRS Client Services, KC-6
 PO BOX 396 STN WATERLOO
 WATERLOO, ON N2J 4A9

This form is also available on the Manulife Web site at www.manulife.ca/GRO

Your personal information

If you do not know your member number, your Plan Administrator will provide it. Please use the member name currently on our records when submitting a name change.

Must be fully completed 

Plan Sponsor/Employer Reuter Benefits	Policy number 41000033	
Member number	Customer number	
Last name (as listed currently)	First name	Middle initial

Your change of name/addition of spouse

New last name of member	First name	Middle initial
New last name of member	First name	Middle initial
Spouses date of birth (mmm/dd/yyyy)		

A **revocable** Successor Account Holder or Beneficiary can be changed at anytime.

An **irrevocable** Beneficiary can only be changed with written consent from that Beneficiary. You will also need your Beneficiary's consent to withdraw or transfer money from your Account. A parent or guardian cannot provide consent on behalf of a minor who has been named as irrevocable Beneficiary.

If you want to name more than three beneficiaries, attach a dated and signed separate page with the names and the percentage of proceeds for each Beneficiary.

If you die while your Beneficiary is still a minor, the trustee you name on this form will act on the child's behalf.

Your Beneficiary (or beneficiaries)

If you have designated one Beneficiary, and that Beneficiary is your Spouse or Common-Law Partner at the time of your death, your Spouse or Common-Law Partner will become the Successor Account Holder under the Plan and the TFSA will continue unless elected otherwise.

Beneficiary name(s)	Relationship	Percentage of proceeds
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Beneficiary name(s)	Relationship	Percentage of proceeds

The above Beneficiary designation is considered revocable unless you write irrevocable in the above designation.

If you do not name a Beneficiary, proceeds will be paid to your estate.

I have attached a separate page, signed and dated listing my beneficiaries.

For Quebec only:

The designation of a Spouse as a Beneficiary is deemed to be irrevocable unless specified here: Revocable

Trustee for a minor beneficiary named above (not applicable in Quebec)

Any payment to a beneficiary who is a minor will be paid in trust to the trustee named below.

In Quebec, the proceeds will be paid in trust to the minor child's tutor.

Trustee name	Relationship
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Your change of mailing address

New mailing address (number, street and apt. number)					
City	Province	Postal Code	Country	Telephone number	Ext.
Email (if applicable)					

Other changes

***You must sign to authorize
ANY of the above changes.***

Please sign here

Member's signature

Date signed (mmm/dd/yyyy)

Witness / Plan Administrator's signature (cannot be beneficiary if submitting a beneficiary change) Date signed (mmm/dd/yyyy)

As current irrevocable beneficiary, I hereby consent to the change in beneficiary indicated in section 3.

Irrevocable beneficiary's signature (if required)

Date signed (mmm/dd/yyyy)