

## 1. PLAN MEMBER INFORMATION

Group \_\_\_\_\_ Account \_\_\_\_\_ Certificate \_\_\_\_\_

Plan Member \_\_\_\_\_  
First Name Middle Last Name

Address \_\_\_\_\_  
Street City Province Postal Code

Email \_\_\_\_\_

## 2. BENEFICIARY DESIGNATION

**Percentage allocation will be deemed equal unless indicated otherwise. Percentages must total 100%.**

All previous designations for the coverage checked above are revoked and I declare that all benefits payable under the Policy after my death for the coverage checked, shall be paid to the following:

### PRIMARY BENEFICIARY(IES)

If you do not name a beneficiary, your "estate" will be the beneficiary. % Allocated

|            |        |           |              |   |
|------------|--------|-----------|--------------|---|
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |

In Quebec, the designation of your spouse as a beneficiary is irrevocable unless you declare otherwise. I designate my spouse as revocable beneficiary: Yes

### CONTINGENT BENEFICIARY(IES)

A contingent beneficiary is applicable if the primary beneficiary predeceases the Plan Member.

|            |        |           |              |   |
|------------|--------|-----------|--------------|---|
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |
| First Name | Middle | Last Name | Relationship | % |

In provinces other than Quebec, if a designated beneficiary is a minor, please name a trustee. Insurance proceeds will be paid to the trustee if the beneficiary has not reached the age of majority at the time the insurance proceeds are payable.

### TRUSTEE

If no trustee is named for minor children, the funds are paid to the Public Trustee (or equivalent government official) until the children reach the age of majority.

In Quebec, the Civil code provisions apply. It is not necessary to designate a trustee. The benefits will be paid directly to the child's tutor, without the requirement for a designation of a trustee.

|            |        |           |              |
|------------|--------|-----------|--------------|
| First Name | Middle | Last Name | Relationship |
| First Name | Middle | Last Name | Relationship |

### 3. PRIVACY AND PLAN MEMBER SIGNATURE

#### MDM Privacy Statement

MDM Insurance Services Inc. ("MDM") is committed to protecting the privacy, confidentiality, accuracy and security of the personal information it collects, uses, retains and discloses in the course of conducting business. To build a lasting relationship with you, and to provide you with requested products, services and advice, we require specific information. The personal information we collect provides us with an accurate profile that relates specifically to you. The information we gather about you varies, depending on your desired product or service and can be collected directly from you or from a third party.

We may collect, use and disclose your information with your agent, broker, plan administrator, and/or other insurers. This would only be done as reasonably required for the purposes stated above.

Before using your information for any purpose other than those listed above, we will explain the purpose and obtain your consent. We do not collect, use or disclose your personal information without your consent, except where authorized by law. We do not share your health information without your express consent.

You can find more details about our privacy policy and how to contact our Privacy Officer at <https://mdm-insurance.ca/policies/privacy-policy/>.

Plan Member Signature

Date

\_\_\_\_\_  
MMM/DD/YYYY

**PLEASE KEEP A COPY OF THIS DESIGNATION FOR YOUR RECORDS.**