

Registered plans beneficiary designation and successor annuitant form

BMO SmartFolio

Account #	Planholder's last name	First name	Middle initial
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I revoke any prior designations of beneficiaries, contingent beneficiaries and/or successor annuitant I have made for this Plan (whether on the RSP or RIF application form or separately in writing), and I make the following new designations for the Plan now on this form.

Beneficiary designation

For all provinces & territories, except Quebec — I designate the following person(s) to receive the proceeds of the Plan on my death. If a beneficiary I have designated below dies before me, and I have not designated a contingent beneficiary for that beneficiary (or the contingent beneficiary(ies) for that beneficiary have also died before me), then that beneficiary's percentage entitlement will be shared among any other beneficiaries (or their contingent beneficiaries) I have designated who survive me, in proportion to their percentage entitlement. I understand that if I do not designate any beneficiaries (or if all designated beneficiaries and contingent beneficiaries die before me) my estate will be entitled to the proceeds of the Plan.

► Beneficiary A		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	Percentage entitlement %
► Beneficiary B		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	Percentage entitlement %
► Beneficiary C		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	Percentage entitlement %
TOTAL PERCENTAGE ENTITLEMENT MUST EQUAL 100%.		100 %

Contingent Beneficiary(ies) — A contingent beneficiary will be entitled to receive the percentage entitlement of a beneficiary designated above, if that beneficiary has died before me. If I have designated more than one contingent beneficiary for that beneficiary, then that beneficiary's percentage entitlement will be shared equally among all the contingent beneficiaries for that beneficiary who are alive at my death.

► Contingent Beneficiary for <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	
► Contingent Beneficiary for <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	
► Contingent Beneficiary for <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C		
Last name	First name	Middle initial
Relationship to account holder	Date of birth (DD-MMM-YYYY)	

Designation of successor annuitant for a RRIF

For all provinces & territories, except Quebec — I designate my spouse or common-law partner, by naming them below, to be the successor annuitant for the Plan, to receive continuing payments from the Plan after my death. If I have designated both a successor annuitant (below) and beneficiary(ies) above, and both are alive at my death, then the designation of successor annuitant takes precedence. The successor annuitant may, after my death, revoke or change the beneficiary(ies) I have designated. A successor annuitant cannot be designated if the Plan is a LIF or LRIF. My designation of a successor annuitant will not be effective if the person designated is no longer my spouse or common-law partner at the time of my death.

Spouse or common-law partner Last name	First name	Middle initial
Social Insurance Number of spouse or common-law partner		

For Quebec: Where the law of Quebec applies, a designation of successor annuitant and/or beneficiaries made on this form cannot be given effect. Effect can only be given to a designation made in a will or other written document that meets the requirements of a testamentary disposition under the law of Quebec.

CAUTION: Your designation of a successor annuitant or beneficiary(ies) for this Plan will not be revoked or changed automatically as a result of any future marriage or common-law relationship or breakdown of marriage or common-law relationship. It will be your responsibility to revoke or change the designation, if you wish.

Minor Child: Where a beneficiary is a minor child, it is the responsibility of the Planholder to ensure that a trustee and/or a guardian of the minor child’s property has been validly appointed under applicable provincial law.

Power of Attorney: A designation of a successor annuitant or beneficiary made, changed or revoked by a person acting under a power of attorney is generally not valid under applicable provincial law and may not be given effect.

Planholder signature <div>SIGN HERE</div>	Date (DD-MMM-YYYY)
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