

## Change form Group Tax-Free Savings Account (TFSA)

Please print clearly in the blank boxes.

- Name change
- Beneficiary change
- Address change

Send your completed form to:  
**Manulife Financial**  
**Attn:** GRS 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/CCCU](http://www.manulife.ca/CCCU)

### Your personal information

*Please use the member name currently on our records when submitting a name change.*

**Must be fully completed** 

Plan Sponsor <b>Coastal Community</b>		Policy number <b>41002708</b>
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)		

### Your Beneficiary (or beneficiaries)

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.

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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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

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

### Please sign here

Member's signature	Date signed (mmm/dd/yyyy)
Witness (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)
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