

Change of Information or Beneficiary – Member Update

Complete this form if your personal information, marital status or designated beneficiary information changes.

Note: Date format is dd-mmm-yyyy for all date fields.

A Member identification – information currently on file at the CAAT Pension Plan

Last Name	First Name	Initial	Social Insurance Number	Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

B Change of personal information – complete *only* the information that has changed

Last Name	First Name	Initial	Social Insurance Number	Date of Birth	Sex (M/F)	Language Preference
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	English French
Mailing Address			Telephone (include area code)	Effective date of address change		
<input type="text"/>			<input type="text"/>	<input type="text"/>		

C Change of marital status – use this section to provide information about your marital status and your spouse if applicable

Your spouse is the person to whom you are legally married or in a common-law relationship. Common-law, for the purposes of the CAAT Pension Plan means a couple that has been living together for at least three years (or less if the couple has children).

Current Marital Status on file	Single	Married	Common-Law	Widowed	Divorced	Separated
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Marital Status - Please update your marital status here:

Married	Common-Law	Complete the information about your eligible spouse.			
Spouse Last Name	Spouse First Name	Sex (M/F)	Spouse Date of Birth	Date of Marriage/Start of Common-Law	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Widowed	Date of death of spouse	Please provide a copy of the Death Certificate.
<input type="text"/>	<input type="text"/>	

Divorced	Separated	Date of divorce/separation	Visit our website to learn about the treatment of pensions on relationship breakdown. The Plan may require a copy of your separation or divorce agreement to verify the separation or divorce.
<input type="text"/>	<input type="text"/>	<input type="text"/>	

D Change of designated beneficiary - use this section to name the designated beneficiaries of your CAAT Pension Plan pre-retirement death benefit

Please note: This beneficiary designation revokes any prior beneficiary designations you may have submitted to the CAAT Pension Plan. An individual acting on behalf of a Member cannot change a beneficiary designation, only the Member has that authority.

The CAAT Pension Plan pays a pre-retirement death benefit if you die before you retire. If you have an eligible spouse on the date of your death, he or she is the sole recipient of the pre-retirement death benefit. Your designated beneficiaries can only receive the pre-retirement death benefit if you do not have an eligible spouse on the date of your death. You should name as your designated beneficiaries the person or persons who you would like to receive the pre-retirement death benefit in the event that you do not have an eligible spouse on the date of your death.

If you do not have an eligible spouse on the date of your death and have not named any designated beneficiaries, the pre-retirement death benefit will be paid to your estate. However, if you do not have an eligible spouse, but have eligible children on the date of your death (dependent children, under age 18), they receive a children's pension and the pre-retirement death benefit paid to your designated beneficiaries or estate will be correspondingly reduced.

The CAAT Pension Plan considers your spouse to be the eligible spouse for the pre-retirement death benefit if:

- You and your spouse are living together at the time of your death (in other words, not living "separate and apart"), and
- Your spouse has not waived pre-retirement death benefits.

Refer to the CAAT Plan's website for more details on the pre-retirement death benefit, eligible spouse, and waiver.

The total % **Share** must add up to exactly 100%.

If you want to name more than 4 beneficiaries, please attach a separate form.

Full Name	Date of Birth	Relationship	% Share	Full Name	Date of Birth	Relationship	% Share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Full Name	Date of Birth	Relationship	% Share	Full Name	Date of Birth	Relationship	% Share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

E Member Authorization

Member Signature	Date
<input type="text"/>	<input type="text"/>