

Spousal and Beneficiary Designation Form

For information on when to use this form, please see the *Frequently Asked Questions (FAQ)*.

How to complete this form:

To update:	Complete:
Spousal information only	Sections 1, 2, and 4
Beneficiary information only	Sections 1, 3, and 4
Both spousal and beneficiary information	All sections (1, 2, 3, and 4)

Please print clearly and review the form to ensure the information you provide is complete and accurate.

Section 1: Member Information

First Name

Last Name

SIN

Telephone Number

Email

Section 2: Spousal Information

Your qualifying spouse, as defined by the Healthcare of Ontario Pension Plan (HOOPP), is by law entitled to receive any survivor benefits (see FAQ).

Please select **one** option:

- I do not have a qualifying spouse/I no longer have a qualifying spouse.
- The person named below is my qualifying spouse.

First Name

Last Name

Date of Birth (MM / DD / YYYY)

Section 3: Beneficiary Designation

You should not designate your spouse as a beneficiary unless he/she has waived their rights to spousal benefits. For more information about spousal waivers, please visit hoopp.com.

You may designate any person(s), organization(s) or your estate as your beneficiary(s) to receive survivor benefits if you and your spouse pass away or if you do not have a qualifying spouse.

If you complete this section, you are cancelling and replacing all previous beneficiary designations you have made relating to your pension benefits with HOOPP.

Name (First name, Last name) or Organization or Estate	Date of Birth (MM / DD / YYYY)	% of Benefit*
		TOTAL: 100%

*If you designate more than one beneficiary, please specify the percentage each is to receive. If your beneficiary(s) predeceases you, or if the total percentage does not equal 100%, any benefit payable when you pass away will be divided proportionately among your surviving beneficiaries or be paid to your estate.

Section 4: Member Declaration

I certify that the information provided by me on this form is true and accurate. I understand that all beneficiary designations and any benefits payable to either a spouse or beneficiary(s) when I pass away are subject to the terms of the *HOOPP Plan Text* and the requirements of applicable legislation as at the relevant date. I acknowledge that personal information on this form is being collected, used and maintained in order for HOOPP to provide pension services. I understand that personal information may be disclosed to third parties under contract with HOOPP to complete these services.

Member Name (please print)

Signature of Member

Date (MM / DD / YYYY)

Frequently Asked Questions

When should I use this form?

This form can be used to:

- Update beneficiary(s) information
 - Update information about a qualifying spouse before retirement
 - Inform HOOPP that your qualifying spouse at retirement has passed away. If this applies to you:
 - i. Go to Section 2 and select “I no longer have a qualifying spouse”
 - ii. Provide a copy of your late spouse’s death certificate
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When should I not use this form?

This form should not be used by retired members to add a new spouse. Please contact HOOPP for more information about how to add a spouse post-retirement.

Who is a qualifying spouse?

A qualifying spouse is a person who, at the earlier of the date you retire or pass away, you are:

- (1) Married to, but not separated from; or
 - (2) Living with in a common-law relationship
 - i. Continuously for a period of not less than one year, or
 - ii. Of some permanence, if he/she is the parent of your child.
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Who can I designate as my beneficiary?

You can designate any person(s), organization(s) or your estate as your beneficiary(s). If spousal benefits have been waived, your qualifying spouse can also be designated as a beneficiary.

What’s the difference between a qualifying spouse and a beneficiary?

A qualifying spouse is by law entitled to receive a survivor benefit when you pass away. Your beneficiary(s) would only receive any applicable benefits if you don’t have a spouse, if your spouse has waived their spousal rights, or if your spouse passes away before you.

Can I designate my qualifying spouse as my beneficiary?

By law, your qualifying spouse is required to receive any pre-retirement or post-retirement survivor benefits. However, if your spouse has waived his/her rights to spousal benefits, you can designate your qualifying spouse as your beneficiary to receive any remaining survivor benefits.

What happens if I do not designate a beneficiary?

If you **do not** have a qualifying spouse and you do not designate a beneficiary, then any benefit payable when you pass away will be paid to your estate.

If you have a qualifying spouse, then any survivor benefits will be paid automatically to your qualifying spouse when you pass away.

What happens if I have already designated a beneficiary(s) for my HOOPP benefit in my Will?

By using this form to designate a beneficiary(s), you will cancel and replace any beneficiary designation for your HOOPP pension benefits that you have made in any Will that was signed or dated prior to completing this form. It is important to keep HOOPP informed of any beneficiary changes you require to your pension benefits by completing a beneficiary designation form.

What if I execute a Will after I have filed this beneficiary designation with HOOPP?

If you execute a Will after filing this beneficiary designation with HOOPP, it is important for you to understand whether it overrides or revokes this beneficiary designation. We recommend that you seek legal advice to understand how your Will may impact your HOOPP beneficiary designation. The information on your statements and other materials from HOOPP will only reflect the beneficiary(s) we have on file with HOOPP and will not reflect any changes that you make in your Will.

We're here to help!

For more information, we encourage you to visit hoopp.com. You can also contact our Member Services team at 416-646-6445 or toll-free at 1-877-43HOOPP (46677). We are available Monday to Friday, 8 a.m. to 5 p.m., Eastern Time.

Healthcare of Ontario Pension Plan

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