

**Appendix**

**PART I  
Forms**

**Form 0.1**  
[Clause 29(4.4)(a)]

**SPOUSE'S WAIVER OF DESIGNATED BENEFICIARY STATUS UNDER A  
LOCKED-IN RETIREMENT ACCOUNT CONTRACT**

I, \_\_\_\_\_, certify that I am the spouse  
(print or type full name of spouse)

(within the meaning of clause 2(1)(ff) of *The Pension Benefits Act, 1992*) of \_\_\_\_\_

\_\_\_\_\_  
(print or type full name of the contract owner)

(hereinafter called "the owner") who is the owner of a locked-in retirement account contract (hereinafter called "the contract") that is subject to the provisions of *The Pension Benefits Act, 1992*.

1. I understand that, in the absence of this waiver, on the death of the owner, I am entitled to the balance of the money in the contract, to the extent permitted by the *Income Tax Act* (Canada).

2. I understand and declare that, by signing this waiver and filing it with the issuer of the contract:

- (a) I am giving up my status and rights as designated beneficiary; and
- (b) on the death of the owner, the balance of the money in the contract will be paid, to the extent permitted by the *Income Tax Act* (Canada):
  - (i) to the beneficiary designated by the owner if the designated beneficiary is a person other than myself; or
  - (ii) to the personal representative of the owner's estate in his or her representative capacity if there is no valid designation of a beneficiary.

3. I certify that this waiver is being signed freely and voluntarily without any compulsion on the part of the owner and outside the immediate presence of the owner.

4. I understand that I may revoke this waiver at any time before the date of the owner's death by providing written notice to the issuer of the contract.

In witness whereof, I sign this waiver at \_\_\_\_\_

this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_

in the presence of \_\_\_\_\_

(print or type name of witness)

of \_\_\_\_\_

(address of witness)

\_\_\_\_\_  
(Signature of witness)

\_\_\_\_\_  
(Spouse's signature)