



Appointment of Trustee

Policy proceeds cannot be paid to a minor. If designating a beneficiary who is a minor or who lacks legal capacity you may wish to appoint a trustee/administrator by completing this form. This appointment may not be suitable for all purposes. If you are designating a trustee/administrator we recommend you consult with a legal advisor and with any proposed trustee/administrator.

Employee Name		
Last _____	First _____	Middle Initial _____

Employer Name

Employee Identification Number

Policy Number

A trustee is the person you appoint to manage the proceeds of your life insurance policy on behalf of a minor Beneficiary. Please note, as the employee you cannot be the trustee and the person you elect as a trustee should NOT be listed as a beneficiary.

I hereby nominate & appoint as trustee:

Trustee			
Last _____	First _____	Middle Initial _____	Relationship to Employee _____

for those beneficiaries under the Age of Majority by Province or Territory, to receive and disburse any monies payable under the said group policy to my beneficiaries during the minority of each beneficiary.

Signed this: _____ day of _____, _____
Day Month Year

Employee Signature _____

Witness Signature _____

Witness must be of legal age and someone other than the beneficiary

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Please keep a copy for your records