

1. Client Information	<div style="display: flex; justify-content: space-between;"> Last Name First Name Account Number </div>
2. Estate Designations	<p><i>You are cautioned to seek professional advice prior to completing the following beneficiary designation regarding the income tax consequences of designating any particular beneficiary and the testamentary effect of this form under the laws of client's domicile, including its effect in respect of any prior or subsequent Will or testamentary instrument. This form of beneficiary designation may not be effective if a Locked-In Supplement is attached to the Account. This beneficiary designation is made pursuant to the Account. You hereby revoke any previous designation of beneficiary with respect to their interest in the Account.</i></p> <p><i>When changing an existing account beneficiary, successor holder and/or successor annuitant, this document must be witnessed. The witness cannot be the person named as the new beneficiary, successor holder and/or successor annuitant.</i></p> <p>a. Estate beneficiary (all account types): In the event of my death, I hereby designate the following person(s) as my beneficiary entitled to receive my interest in this Account if living at my death. I reserve the right to revoke this designation.</p> <p style="margin-left: 20px;"><i>Name of Beneficiary:</i> _____ <i>Relationship to Me:</i> _____</p> <p style="margin-left: 20px;">i. _____</p> <p style="margin-left: 20px;">ii. _____</p> <p style="margin-left: 20px;">iii. _____</p> <p>b. Successor holder (TFSA only): To maintain the tax-free status of the earnings, I elect to make my current spouse or common-law partner (identified below) a successor account holder under my TFSA. I hereby designate in the event of my death my spouse/common-law partner as the successor holder for my TFSA if, on the date of my death, he or she is (i) alive and (ii) my spouse or common-law partner. I reserve the right to revoke this designation.</p> <p style="margin-left: 20px;">_____ <i>Name of Spouse / Common-Law Partner</i> _____ <i>Social insurance Number</i></p> <p>c. Successor annuitant (RRIF, LIF, New LIF, LRIF, PRIF, and RLIF only): I hereby elect that my spouse or common-law partner (identified below), if living and remaining my spouse or common-law partner at the time of my death, shall continue to receive payments as Successor Annuitant under my Account and, to the extent possible and permitted by law, shall acquire all rights I have as holder thereof. I reserve the right to revoke this designation.</p> <p style="margin-left: 20px;">_____ <i>Name of Spouse / Common-Law Partner</i> _____ <i>Social Insurance Number</i></p>
3. Authorization	<p>I am the owner of the account(s) identified herein and certify all of the information on this direction is true, complete and correct. I understand Olympia may reject my request if the information contained in this direction is not true, complete and correct.</p> <p>I hereby waive, release and forever discharge Olympia from any and all liability that Olympia may have for any losses, costs, damages, expenses, charges, taxes, penalties, assessments, fines, liabilities and obligations that I may suffer, pay or incur and, in addition, agree to indemnify, defend and hold Olympia harmless from and against any losses, costs, damages, expenses, charges, taxes penalties, assessments, fines, liabilities and obligations, including any legal fees and disbursements on a full indemnity basis, any costs incurred in connection with the enforcement of this indemnity and any indirect, incidental, consequential, exemplary, special or punitive losses or damages or loss of profits that Olympia may suffer, pay or incur to the extent arising out of, relating to, this direction or Olympia's reliance thereon.</p> <p style="margin-left: 20px;">_____ <i>Client Signature</i> _____ <i>Date (mm/dd/yyyy)</i></p> <p style="margin-left: 20px;">_____ <i>Witness Signature</i> _____ <i>Witness Name</i></p>

Privacy Notice: In providing services to you, we receive non-public, personal information about you. We receive this information through the transactions we perform for you and may also receive information about you by virtue of your transactions with our affiliates and other parties. We will hold your personal information in accordance with our Privacy Policy, a copy of which may be found on our website at www.olympiatrust.com.