

General Information and Instructions

1. Identification of the Beneficiary

The beneficiary is the person to whom the death benefit is payable upon the death of the insured/annuitant.

2. Declaration of Tax Residence of the Beneficiary (Self-Certification)

Generally, an individual will be a tax resident of a tax jurisdiction if, under the laws of that jurisdiction, they pay or should be paying tax there because of their domicile, residence, or a similar criterion.

Individuals who are tax residents in more than one jurisdiction can rely on the tiebreaker rules in tax conventions (when they apply) to resolve cases of dual tax residence.

According to the CRA, you are a **non-resident of Canada for tax purposes** if **one** of the following situations applies:

- You normally, customarily, or routinely live in another country where you are not considered a resident of Canada.
- You do not have significant residential ties in Canada; **and** are in **one** of the following situations:
 - you live outside Canada throughout the tax year;
 - you stay in Canada for less than 183 days in the tax year.

For more information on how to determine resident status for tax purposes, please refer to the CRA website at cra-arc.gc.ca.

A **tax identification number** (TIN) is a unique identifier made of letters or numbers that the jurisdiction assigns to an individual. The jurisdiction uses the TIN in administering its tax laws to identify the individual. Enter the TIN in its official format.

If you are eligible to receive a TIN but you do not have one, you have 90 days to apply for one from your jurisdiction of residence and 15 days after you receive it to confirm it to SSQ in writing.

3. Declaration and Signature of the Beneficiary

Please read this section carefully and then sign and date the form.



Values in the right place

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