

Spousal Waiver of Survivor Pension Benefits Checklist



PROBLEM:

Determining who's entitled to pension plan survivor benefits of a dead plan member (or former member) is complicated. Regardless of who plan members designate as their beneficiary, you must figure out whether a spouse exists (either actual or at common law) and if so, whether that spouse is entitled to first priority of the member's benefits.

HOW TOOL HELPS SOLVE THE PROBLEM:

Here's a form you can give to plan members who want to name someone other than their spouse as a designated beneficiary of their pension plan benefits. Adapt the form to meet the needs of your company and make sure the member's spouse (common-law or actual) completes and signs it properly.

This form was drafted to comply with the law in BC. You'll need to tailor it to meet the requirements of your jurisdiction. Be sure to have your lawyer approve your form before you use it.