

IMPORTANT NOTE: Please fill out this form completely. The information provided on this form will replace information provided on all earlier Member Information Forms or Application Cards. You must notify us of any changes to the information below.

MEMBER'S PERSONAL INFORMATION

NAME: LAST		FIRST / MIDDLE		UNION ID NUMBER U	
APT. NO.		NUMBER / STREET		CITY	
EMAIL		TELEPHONE		PROV. POSTAL CODE	
DATE OF BIRTH MONTH DAY YEAR		DIVISION NAME ☐ SHINGLING ☐ SIDING		UNION INITIATION DATE MONTH DAY YEAR	
				MARITAL STATUS ☐ Single ☐ Married ☐ Widowed ☐ Common-Law ☐ Separated ☐ Divorced	
				M-MALE ☐ F-FEMALE ☐ NB-NON-BINARY ☐	

MARITAL STATUS

If you are married, please provide date of marriage: _____

If you are Separated or Divorced, please provide a copy of your Divorce/Separation Agreement.

If you are in a Common-Law relationship, please complete the following statement:

I do hereby declare that _____ (spouse's name - please print) is my Common-Law Spouse with whom I have been cohabiting since _____ (date cohabitation commenced) and whom I publicly represent as my Spouse.

(Your Signature)

PERSONAL INFORMATION ABOUT MEMBER'S DEPENDANTS - INCLUDING SPOUSE

Please list Dependants for benefit coverage below. Common-Law spouses are eligible for **benefits** if they have been living together in a conjugal relationship for 12 consecutive months.

NAME: LAST	FIRST / MIDDLE	DATE OF BIRTH			SEX M-MALE/F-FEMALE/NB-NON-BINARY	RELATIONSHIP
		MONTH	DAY	YEAR		

The Trustees of the Plans reserve the right to request further documentation supporting the enrollment of any Dependant added for coverage under the Plans. Such supporting documentation may include a marriage certificate, birth registration or other documents supporting a common law relationship. I hereby certify that the requested information provided above is true and complete. I understand and agree that the coverage and benefits of the Plans (and future claims) may be denied, or terminated, and that the Trustees may take such other actions as they deem necessary in their sole discretion, as a result of me or my Dependants providing false, incomplete, or misleading information to the Plans. I consent to the collection of my personal information for Plan administration purposes.

COORDINATION OF BENEFITS

Is benefit coverage available to you and/or Dependants from another health benefit plan(s)? Yes ☐ No ☐

If Yes, please provide:

Name of individual(s) covered as the member under the other plan(s): _____

Relationship (ie: spouse, ex-spouse, step-parent to my Dependants, guardian to my Dependants): _____

Name of other plan(s): _____

Does the other benefit plan provide coverage for your whole family, or just the individual listed?
Family Coverage ☐ Single Coverage ☐

COMPLETE BOTH PAGES AND RETURN TO THE PLAN ADMINISTRATION OFFICE

2255 Sheppard Ave. E, Atria 1, Suite 201, Toronto, ON M2J 4Y1 carpentersresidential.ca

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**CARPENTERS' RESIDENTIAL BENEFIT PLANS - LOCAL 27 ONLY
MEMBER INFORMATION FORM**

If you are participating in the Health and Wellness Fund, please complete this section.

The person(s) named as your Health and Wellness Beneficiary will be the recipient of your life insurance payment (if applicable).

CARPENTERS' RESIDENTIAL HEALTH AND WELLNESS FUND BENEFICIARY

Group Term Life Insurance and Accidental Death and Dismemberment

LAST NAME	FIRST/MIDDLE	RELATIONSHIP
TELEPHONE	EMAIL	DATE OF BIRTH

Check this box if the above named is an irrevocable beneficiary ☐

If the above beneficiary(ies) predeceases me, my contingent beneficiary is: _____
First name, Last name Relationship

If your original and contingent beneficiary predecease you and no new beneficiaries have been appointed, benefits payable are paid to your Estate.

If you are participating in the Productivity Bonus Trust Fund, please complete this section.

The person(s) named as your Productivity Bonus beneficiary will be the recipient of any remaining Productivity Bonus benefit Upon your death

CARPENTERS AND ALLIED WORKERS LOCAL 27 SHINGLING & SIDING DIVISION PRODUCTIVITY BONUS TRUST FUND BENEFICIARY

LAST NAME	FIRST/MIDDLE	RELATIONSHIP
TELEPHONE	EMAIL	DATE OF BIRTH

Check this box if the above named is an irrevocable beneficiary ☐

If the above beneficiary(ies) predeceases me, my contingent beneficiary is: _____
First name, Last name Relationship

If your original and contingent beneficiary predecease you and no new beneficiaries have been appointed, benefits payable are paid to your Estate.

Caution: Your designation of a beneficiary by means of this Member Information Form will not be revoked or changed automatically by any future event (including marriage or divorce) unless required by law or regulation. Should you wish to change your beneficiary, you must do so by completing a new Member Information Form.

The person named as a Trustee will receive any benefits payable on behalf of your beneficiary(ies), if they are under the age of majority at the time of your death (not applicable in Quebec).

TRUSTEE FOR ALL FUNDS

Trustee's Name _____ Relationship _____
first name, last name

CARPENTERS' RESIDENTIAL GROUP RPP TRUST FUND BENEFICIARY - FILED USING A SEPARATE DOCUMENT WITH MANULIFE FINANCIAL.

By signing below, I hereby certify that the information provided is true to the best of my knowledge, and consent to the collection, maintenance, use and disclosure of my personal information as described in the Privacy Statement below. I acknowledge that providing my consent will allow access to the information required to assess my benefit eligibility and entitlement, and that refusing to consent may result in delay or denial of my request and/or benefit. This consent may be revoked by me at any time by sending written instructions to the Plan Administration Office.

I consent to the collection, use and disclosure of my personal information ☐ **YES** ☐ **NO**

This form requires a witness who is not your spouse or beneficiary to sign where indicated.

Signature and Consent

Date

Please ensure that your signature is witnessed by someone other than your Spouse or Beneficiary.

Witness Signature: _____ **Witness Printed Name:** _____

Witness Telephone: _____ **Witness address:** _____

Witness Email: _____

Privacy Statement: I authorize the Carpenters' Residential Benefit Plans (called "the Plan"), their administrator Employee Benefit Plan Services Limited, and providers working with the Plans or administrator to collect, maintain, use and disclose my personal information that is necessary for the administration of the Plans. Personal information will be protected pursuant to the applicable legislation. The Plans may collect, maintain, use and disclose my personal information with relevant persons or organizations (employers, health benefit managers, health professionals, institutions, insurers, investigative agencies, legal counsel, other plans or unions, pharmacies, regulators, re-insurers) in order to manage the Plans and entitlement to the benefits of the Plans, and may include information such as financial, health or benefits related information. Questions related to the Privacy Statement should be directed to the Privacy Officer.

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