
Appointment of Trustee

POLICY NO. _____ ISSUED BY INDUSTRIAL ALLIANCE INSURANCE AND FINANCIAL SERVICES INC.

POLICYHOLDER: _____

I HEREBY APPOINT _____ **AND** _____ **TO**
BE TRUSTEE(S) FOR _____,
_____, **AND** _____ **TO RECEIVE**
ALL MONIES PAYABLE TO HIM/HER/THEM AS BENEFICIARY(IES) OF THE ABOVE NOTED
POLICY UNTIL HE/SHE ATTAINS, OR THEY RESPECTIVELY ATTAIN, THE AGE OF (18)
EIGHTEEN.

SUCH TRUSTEE(S) MAY PAY OR APPLY INCOME AND/OR CAPITAL FOR THE
MAINTENANCE AND EDUCATION OF THE SAID BENEFICIARY(IES) AS HE/SHE/THEY, IN
HIS/HER/THEIR ABSOLUTE DISCRETION, THINK(S) FIT.

I understand that the personal information provided regarding my insurance coverage may be collected and used by or disclosed to Industrial Alliance Insurance and Financial Services Inc., its reinsurers, agents or third party administrators for the purpose of administration, marketing of products and services, and investigation of claims.

DATED THIS _____ **DAY OF** _____, _____.

SIGNED IN THE PRESENCE OF:)

)

)

Signature of Witness

)

Signature of Insured Person

Name of Insured Person (Please Print)

NOTE CAREFULLY:

1. One or more Trustees can be appointed.
2. The person appointing a Trustee has power to lay down all the terms and conditions regarding the holding, investment and use of the funds. Such terms and conditions do not affect Industrial Alliance Insurance and Financial Services Inc. and do not have to be included in this appointment or filed with the Company; they can be set down separately for the guidance of the Trustee.
3. The witness should not be an interested party to the Appointment.