Retiree Plans

Johnston group Executive Plan

TRICOR

JG10-JG

APPLICATION FORM

Office Use Only

Eligibility confirmed _____

Effective date of coverage _____

Firm number _____

Certificate number _____

General Information and Prior Coverage Confirmation

Applicant's Last Name _____ First Name _____ Initial _____

Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

Language of preference: ❑ English ❑ French

Eligibility for this plan is limited to individuals who have been an Owner, Dealer, Principal, or Executive for last five years, actively at work at time of retirement, and who have been covered under a Johnston Group Inc. administered plan for the past two years.

Please indicate the current/previous Tricor Maximum Benefit administered plan you were covered under:

Firm Name _____

Firm # _____ Certificate # _____ Date coverage ended (YYYY/MM/DD) _____

Please provide contact information from your previous Tricor Maximum Benefit administered plan, should we need to verify your eligibility:

Name _____ Phone _____

Title _____ Email _____

Plan Choice

I apply for Health and Dental Retiree coverage of:

❑ Plan A with (select one)	❑ Drug Option 1	❑ Drug Option 2	❑ No Drugs
❑ Plan B with (select one)	❑ Drug Option 1	❑ Drug Option 2	❑ No Drugs
❑ Plan C with (select one)	❑ Drug Option 1	❑ Drug Option 2	❑ No Drugs

For individuals to be eligible for any benefits under the Emergency Travel benefit, coverage must be in effect prior to departure. If individuals are out of the country when the plan goes into effect, the travel coverage will not go into effect until they return to their province of residence.

Individuals To Be Covered

Individuals covered under the above group health and dental plan are eligible for Retiree coverage. Please indicate the individuals applying for coverage:

Extended health care coverage for a dependent who is hospitalized on the date they become eligible for coverage, other than a newborn child, will be delayed until the first day immediately following their discharge from the hospital.

Individual	First & Last Name	Gender Female/Male Other Expression/Undisclosed	Date of Birth YYYY/MM/DD
Applicant			
Spouse			
Dependent Child*			
Dependent Child*			

*__Over-age students__ must complete a *Request for Over-age Dependent Coverage*. __Incapacitated over-age dependents__ must complete a *Request for Over-age Disabled Dependent Coverage* prior to reaching the maximum dependent age for consideration of coverage. Please contact Johnston Group Inc. for the necessary form(s).

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I apply for Life coverage of: ❑ $25,000 ❑ $15,000 ❑ No life coverage

Beneficiary Designation | Please print clearly in INK (crossed out or revised information must be initialled by the applicant)

I understand that the beneficiary designation below applies to this Retiree Plans Life Benefit only and not to any other group benefits I may have. I may change my beneficiary designation at any time without the beneficiary's consent, unless I live in Québec. The Estate will be designated as the beneficiary if no valid beneficiary designation is received.

Last Name	First Name	Middle Initial	% of Benefit	Relationship to Applicant

Divided: ❑ As per percentages above (must total 100%) ❑ In equal shares to survivor(s)

When Quebec law applies, a spouse beneficiary is irrevocable (an irrevocable beneficiary must consent to any change) unless you make the designation revocable by checking here: ❑ **Revocable**, I may change this designation at any time

Trustee/Administrator Designation

If the beneficiary is under the age of majority, I appoint the trustee/administrator named below to receive any amount payable to a minor beneficiary under this policy. The trustee/administrator shall discharge the Insurer for the amount paid. I authorize the trustee/administrator to spend all or part of the amount, or interest earned on it, for the support or education of the minor.

Full Name **Relationship to Applicant**

If you are designating a trustee/administrator, you should consult with a legal advisor and any proposed trustee/administrator.

For Quebec Only: Where this appointment is governed by Quebec law, "trustee" shall be read as "administrator", and all terms interpreted accordingly. The appointment will be interpreted in accordance with provisions governing the administration of property of others, under Quebec Civil Code.

Payment

I hereby tender an initial premium of $_____ payable to Johnston Group Inc. which represents the premium amount for one month of coverage based on the current rate table.

I authorize Johnston Group Inc. through the Toronto-Dominion Bank to make automatic deductions from the account below on the 1st day of each month. I will receive notice of the debit approximately three business days before the 1st of the month. However, I will not receive notice of subsequent month's debits until such time as the amount changes.

I understand that this agreement may be revoked at any time by providing 30 days written notice. I understand that I have certain recourse rights if any debit does not comply with this agreement. For example, I have the right to receive reimbursement for any debit that is not authorized or is not consistent with this agreement. I understand that I may obtain further information on my right to cancel / recourse rights by contacting my financial institution, or by visiting www.payments.ca.

Financial Institution Name _____

Branch Address _____ City _____ Province _____

To ensure we accurately encode all the necessary information, please enclose a sample cheque marked "**Void – Premium Payment**."

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Request for Direct Deposit of Extended Health and Dental Claims

I hereby authorize Johnston Group Inc. to make a direct deposit of my benefit payment(s) to:

❑ the same chequing account shown on the previous page, or

❑ to a different chequing account indicated below:

Financial Institution Name _____

Branch Address _____ City _____ Province _____

To ensure we accurately encode all the necessary information, please enclose a sample cheque marked "**Void – Direct Deposit**."

Declaration & Authorization

I/WE hereby apply for Retiree Coverage. I certify that the information provided herein is true, accurate and complete; and that I am or have been covered under a group health and/or dental plan indicated above within the last 60 days. I understand that my dependents and I must currently be covered under my Provincial Health plan and remain covered in order to be eligible for coverage. I authorize Co-operators Life Insurance Company, Johnston Group Inc., their agents and service providers to use and exchange information for the purposes of underwriting, administering and adjudicating claims under this benefit plan with any person or organization having relevant information about me, my spouse or dependents. I confirm I am authorized to act on behalf of my spouse and/or dependents for such purposes. A photocopy of this authorization is as valid as the original and shall remain in effect throughout the duration of my coverage under this benefit plan.

Applicant's Signature _____ Date _____

Please return the completed application and first month's premium to:
Retiree Program
National Service Centre
1051 King Edward Street,
Winnipeg, MB R3H 0R4

Co-operators Life Insurance Company and Johnston Group Inc. are committed to protecting the privacy, confidentiality, accuracy and security of the personal information that they collect, use, retain and disclose in the course of conducting business.