



Coughlin & Associates Ltd.
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 Winnipeg, MB R3C 3R8
 Ph. (204) 942-4438 1-888-204-1234

HEALTH & WELFARE TRUST FUND

APPLICATION FOR GROUP COVERAGE

Please print clearly and complete both sides of this form, in INK. Sections 2 through 5 are to be completed by the plan member. Completion of this form does not guarantee that you or your dependents are eligible for benefits

1. Privacy

This section explains Coughlin & Associates Ltd.'s commitment to privacy.

Please read carefully.

Protecting Your Personal Information

The Administrator of your Group Benefit Plan is Coughlin & Associates Ltd. (Coughlin). At Coughlin, we recognize and respect every individual's right to privacy. When you apply for coverage, we establish a confidential file that is kept in the offices of Coughlin, or the offices of an organization authorized by Coughlin. We limit access to information in your file to Coughlin staff or persons authorized by Coughlin who require it to perform their duties, to persons to whom you have granted access, and to persons authorized by law. We use the information to determine your eligibility for coverage and to administer the group benefits plan.

Why do we ask for your Social Insurance Number?

We ask for your SIN for:

- Income tax reporting purposes, to comply with the requirements under the Federal Income Tax Act, and
- Administrative purposes, such as ensuring the accuracy and integrity of your personal information by using your SIN as an internal identification number for you.

Use of name and address

From time to time, Coughlin & Associates Ltd. may use the address it has on file to provide you with additional information regarding the life insurance, benefits and/or pension coverage you are entitled to receive through your group benefits program. Your Consent allows Coughlin & Associates Ltd. to send additional information on these programs to you. Your name and address will not be used for any other purpose or disclosed to any other party, except where required by law. If you do not wish to receive such material, please contact Coughlin & Associates Ltd. at 204-942-4438 or, toll free, 1-888-204-1234 and your name and address will be removed from the contact list.

2. Plan Member Information

This section is to be completed by the plan member.

Please print clearly, in INK.

union or plan name

last name

given name(s) (in full) and middle initial

mailing address

city and province

postal code

telephone

email address

date of birth (day/month/year)

social insurance number

Gender

Marital Status

Male Female

Single
 Separated/Divorced
 Widowed

Married
 Common-Law

Date of Marriage or Commencement of Common-Law Relationship

_____ day _____ month _____ year

3. Dependent Information

This section is to be completed by the plan member. Please print clearly, in INK. For purposes of coordination of benefits the insurance industry has established parameters that require the need for the following information in order to coordinate coverages with your spouses carrier (if applicable).

Spouse Information

last name first name middle initial

date of birth (day/month/year)

Gender

Male Female

What group benefits coverage does your spouse have through an employer?

Healthcare

→ Does this include prescription drug coverage?

Single Family Waived None

Yes No

Dentalcare

Visioncare

Single Family Waived None

Single Family Waived None

Dependent Information

If there are more than three dependents, please attach a separate list.

Dependent Information			Date of Birth	Relationship to Insured	Gender	Full Time Student	Disabled Dependent
last name	first name	middle initial	(day/month/year)	_____	Male <input type="checkbox"/> Female <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
last name	first name	middle initial	(day/month/year)	_____	Male <input type="checkbox"/> Female <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
last name	first name	middle initial	(day/month/year)	_____	Male <input type="checkbox"/> Female <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

Please TURN OVER – Both sides of this application must be completed

Please complete:

Plan Name: _____

Plan member name: _____

Date: _____

4. Beneficiary Designation

This section is to be completed by the plan member.

A. Health & Welfare Beneficiary Designation for Life Benefits

This section must be completed to designate a beneficiary for your life benefits, if applicable.

The original copy of this form will be required for a life claim.

Please print clearly, in INK.

(We urge you to address these matters in a Will which should be coordinated with Legal Counsel and kept up to date.)

Note: Not required if the plan member has already completed a written Trust Agreement.

I hereby appoint the following revocable beneficiary(s) of any Health benefits payable under the Trust Fund upon my death, and discharge the Trustees of the Plan to the extent of such payment. (Note: Your designation of a beneficiary will not be revoked or changed automatically by any future marriage or divorce. Should you wish to change your beneficiary in the event of a future marriage or divorce, you will have to do so by means of a new designation). If no beneficiary is named, the distribution of your benefits will be paid to your Estate. If more than one beneficiary is named, **total distribution of the benefits must equal 100%**.

Beneficiary's Name(s)			Percent allocated	Relationship to plan member
last name	first name	middle initial	_____	_____
last name	first name	middle initial	_____	_____
last name	first name	middle initial	_____	_____

Contingent beneficiary - or Secondary beneficiary in the event the beneficiary(s) dies before me, the life benefit set out in the Health & Welfare plan is to be paid to:

_____	Relationship to plan member
.....

TRUSTEE APPOINTMENT

If designating a beneficiary who is a minor (under age 18) or who lacks legal capacity to receive the proceeds, you **must** appoint a trustee/administrator.

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

_____	Relationship to plan member
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5. Authorizations and Declarations

This section must be signed by the plan member.

Authorizations and Declarations

I hereby apply for coverage under the group benefits plan administered by Coughlin & Associates Ltd. I authorize:

- Coughlin to use my social insurance number to administer my coverage and benefits under the group benefits plan, when required;
- Coughlin, any healthcare provider, my insurer, other insurance companies or benefit providers working with Coughlin to exchange information, when necessary, to determine my eligibility for coverage and to administer the group benefits plan.

If applying for coverage for my spouse and/or dependents, I confirm that I am authorized to act on their behalf.

I agree that a photocopy or electronic copy of this Authorizations and Declarations Section is as valid as the original.

I authorize the following persons to request changes to my personal information or request information on my Health & Welfare Benefits:

(Anyone that you name shall be authorized as your agent to request information.)

(Anyone that you name shall be authorized as your agent to request changes.)

I certify that the information given is true, correct and complete to the best of my knowledge.

Plan member signature: _____ Date: _____