

Statement of Spousal Relationship

Please read the explanations on the reverse

OPSEU Pension Trust 1 Adelaide Street East, Suite 1200, Toronto, Ontario M5C 3A7

Telephone: 416-681-6100 Toll-free: 1-800-637-0024 Fax: 416-681-6175

INSTRUCTIONS

This statement must be completed by the member and his/her spouse.

Please check the box that applies to you:

- at the time of enrolment in the OPSEU Pension Plan
- at any time when there is a change in the "spousal relationship"
- at the time of termination, retirement or divestment.

Your Plan Membership Date

(DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Date of termination, retirement
or divestment (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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PERSONAL INFORMATION

Member's Last Name	First Name and Initials	Social Insurance Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Spouse's Last Name	First Name and Initials	Social Insurance Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
E-mail Address	Home Telephone Number	Business Telephone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Address: Number and Street	Apt. No.	
<input type="text"/>	<input type="text"/>	
City/Town	Province	Postal Code
<input type="text"/>	<input type="text"/>	<input type="text"/>

DECLARATION

We have read and understood the definition of spouse and the explanation of "not living separate and apart," as described on the reverse of this form. We understand that, in order to receive survivor entitlements under the OPSEU Pension Plan, the survivor must be an eligible spouse under the OPSEU Pension Plan.

We declare that: (Please ensure that you complete 1 and 2.)

1. We are married to each other **and** not living separate and apart, **or**
We have lived with each other:
- in a common-law relationship continuously for a period of less than three years **and** not living separate and apart, **or**
- in a common-law relationship continuously for a period of at least three years, **and** not living separate and apart, **or**
- in a common-law relationship of some permanence, as the natural or adoptive parents, as defined in the *Family Law Act*, of a child, **and** not living separate and apart.

2. **The date of our marriage or the commencement date of our common-law relationship was:**

Date (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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We make this Statement of Spousal Relationship conscientiously believing it to be true.

Signature of Member

Date Signed (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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Signature of Spouse

Date Signed (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
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ARE YOU AN ELIGIBLE SPOUSE?

Survivor benefits may be payable to you from the OPSEU Pension Plan if your spouse dies, before or after he or she starts to receive an OPTrust pension, and you are the eligible spouse.

Eligibility has two components:

- First, you must satisfy the definition of “spouse” under the OPSEU Pension Plan.
- Second, you must be living “not separate and apart.”

Spouse:

- is one of two individuals whether of the same or opposite sex, who are married to each other
or
- are living together in a conjugal, common-law relationship
 - (a) continuously for a period of not less than three years, **or**
 - (b) in a relationship of some permanence, if they are the natural or adoptive parents, as defined in the *Family Law Act* (Ontario) of a child.

You and your spouse must NOT be living separate and apart when you terminate and retire from the Plan, and at the time of your death, for your spouse to be eligible for the survivor pension.

Not living separate and apart

The concept of *not living separate and apart* does not simply mean that you are residing together. Rather, *not living separate and apart* also means that a spousal relationship exists. Evidence of a spousal relationship includes: eating meals together, sharing a conjugal relationship, participating together in social activities, and having joint finances.

When must these two conditions be met?

In order to receive pre-retirement survivor benefits, the definition of “spouse” and the living “not separate and apart” condition must be met at the time of a member or former member’s death and at the time of termination or divestment from the OPSEU Pension Plan.

In order to be eligible to receive post-retirement survivor entitlements, the definition of “spouse” and the living “not separate and apart” condition must be met at the time of termination or divestment and at the time the pension started to be paid from the OPSEU Pension Plan.

Are you submitting this statement at termination or divestment?

This statement should be completed at the same time you complete your termination or divestment documents. Once you have submitted this statement, please notify us immediately if there are any changes to your spousal status before your date of termination or divestment.