

## SPOUSAL RELATIONSHIP INFORMATION SHEET

In order to determine your spouse's eligibility to receive survivor benefits, we require the following documentation as confirmation of your spousal relationship at the time of termination, retirement or divestment.

### COMMON LAW AND SAME SEX SPOUSES

- Statement of Spousal Relationship (OPTRUST3007).  
AND
- Any **three (3)** pieces of the following documentary evidence under a) to h) below.
  - a) copies of birth certificates or formal adoption papers for children of the member and the spouse. NOTE: If you are not the natural or adoptive parents of a child, please ensure that the remaining documents you choose to submit demonstrate that your spousal relationship was at least three years in duration at the time of termination, retirement or divestment.
  - b) supporting sworn affidavit of a third party who knows the spouse and the member during the period that they have lived together as spouses.

A sworn affidavit is a legal document signed by the third party and sworn before a Commissioner of Oaths (e.g. lawyer, judge). Each sworn affidavit must state:

- i) how long the third party has known the spouse and the member;
  - ii) the period or periods of cohabitation, including any period of separation;
  - iii) any other knowledge and belief the person has that the individuals live together as spouses
- c) a sworn affidavit from an immediate relative of the member providing the same information as the above affidavit;
- d) copies of deeds or leases showing any jointly held or leased property or liabilities, for example mortgages, bank accounts, etc.;
- e) any evidence that the spouse and the member have named each other as beneficiary of RRSPs, life insurance policies, pensions or other investments;
- f) a copy of the member's Will;
- g) previously submitted Statement of Spousal Relationship (OPTRUST3007);
- h) copies of the previous three years' tax returns of the member and the spouse.  
AND
- Copies of divorce judgements, separation agreements, marriage contracts or cohabitation agreements with respect to any previous relationships of the terminating member if they impact on the accrued pension entitlement (i.e. if there is a requirement to split the pension entitlement).

### MARRIED SPOUSES

- Statement of Spousal Relationship (OPTRUST3007).  
AND
- Copy of certificate of marriage;  
AND
- Any copies of divorce judgements, separation agreements, marriage contracts or cohabitation agreements with respect to any previous relationships of the terminating member if they impact on the accrued pension entitlement (i.e. if there is a requirement to split the pension entitlement).