

MEMBER INFORMATION

Member's Last Name	First Name and Initials	OPTrust ID
<input type="text"/>	<input type="text"/>	<input type="text"/>

DOCUMENTS REQUIRED FOR RETIRING MEMBERS

Documents Required (Mandatory)	Attached	To Follow	Comments
Termination of Membership form (OPTrust 1012)	<input type="checkbox"/>	<input type="checkbox"/>	
Employment Information form (OPTrust 1035) (fixed term or casual employees only)	<input type="checkbox"/>	<input type="checkbox"/>	
Proof of member's age	<input type="checkbox"/>	<input type="checkbox"/>	
Pension Beneficiaries form (OPTrust 1015)	<input type="checkbox"/>	<input type="checkbox"/>	
Void cheque	<input type="checkbox"/>	<input type="checkbox"/>	
Group Insurance form (If retiree is entitled to receive insured benefits.)	<input type="checkbox"/>	<input type="checkbox"/>	
Copy of Separation Agreement or Court Order (If separation occurred during plan membership.)	<input type="checkbox"/>	<input type="checkbox"/>	

DOCUMENTS REQUIRED (OPTIONAL)

Documents Required (Optional)	Attached	To Follow	Comments
Ontario Personal Tax Credits Return form (TD1ON E)	<input type="checkbox"/>	<input type="checkbox"/>	
Personal Tax Credits form (TD1 E)	<input type="checkbox"/>	<input type="checkbox"/>	
Determination of Exemption of a Status Indian's Employment Income form (TD1-IN)	<input type="checkbox"/>	<input type="checkbox"/>	

If these forms are not remitted, default exemptions will be applied.

DOCUMENTS REQUIRED FOR MARRIED OR COMMON-LAW RETIRING MEMBERS

Documents Required	Attached	To Follow	Comments
Statement of Spousal Relationship form (OPTrust 3007)	<input type="checkbox"/>	<input type="checkbox"/>	
Spouse's proof of age	<input type="checkbox"/>	<input type="checkbox"/>	
Proof of marriage, OR	<input type="checkbox"/>	<input type="checkbox"/>	
Proof of common-law relationship: Three supporting documents are required to prove the retiree and his or her common-law spouse have been living together for at least three years . (Refer to Information Sheet)	<input type="checkbox"/>	<input type="checkbox"/>	

Please note: A delay in sending proof of common-law documents will delay the processing of the member's pension.

SURPLUS FACTOR 80

This member has been laid off pursuant to the job security provision of the Central Collective Agreement.

Employer

Employer Official's Name

Telephone Number

Employer Official's Signature

Date (DD/MM/YYYY)