

## Statement of Spousal Relationship

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 [www.optrust.com](http://www.optrust.com)

### 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.

PERSONAL INFORMATION		
Member's Last Name	First Name and Initials	Social Insurance Number - -
Spouse's Last Name	First Name and Initials	Social Insurance Number - -
Home Address: Number and Street	Apt. No.	Business Telephone No. ( )

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 you complete 1 **and** 2)

1.  We are married to each other **and** are 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** are not living separate and apart, **or**
- in a **common-law** relationship continuously for a period of at least three years, **and** are 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 \_\_\_\_\_.  
(DD/MM/YYYY)

We make this *Statement of Spousal Relationship* conscientiously believing it to be true.

Signature of Member

(DD/MM/YYYY)

Signature of Spouse

(DD/MM/YYYY)

## **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 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.