



Employer Checklist for Retirements

OPSEU Pension Trust Fiducie du régime de retraite du SEFPO

OPSEU Pension Trust 1 Adelaide Street East, Suite 1200, Toronto, Ontario M5C 3A7
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PERSONAL INFORMATION		
Member's Last Name	First Name and Initials	Social Insurance Number - -

DOCUMENTS REQUIRED FOR RETIRING MEMBERS			
Documents Required (Mandatory)	Attached	To Follow	Comments
Termination of Membership - Application for Entitlement form (OPTrust 1012)	<input type="checkbox"/>	<input type="checkbox"/>	
Employment Information form (OPTrust 1035) (unclassified/seasonal members only)	<input type="checkbox"/>	<input type="checkbox"/>	
Proof of Member's Age	<input type="checkbox"/>	<input type="checkbox"/>	
Identifying Benefit Recipients (Retirement) form (OPTrust 1015R)	<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 membership.)	<input type="checkbox"/>	<input type="checkbox"/>	

Documents Required (Optional)	Attached	To Follow	Comments
TD1 Form – Provincial	<input type="checkbox"/>	<input type="checkbox"/>	
TD1 Form – Federal	<input type="checkbox"/>	<input type="checkbox"/>	
<i>If these forms are not remitted, default exemptions will be applied.</i>			

DOCUMENTS REQUIRED FOR MARRIED OR COMMON-LAW RETIREES			
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 → 3 supporting documents required proving the retiree and his or her common-law spouse have been living together for at least 3 years . (Refer to Information Sheet)	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Please note: A delay in sending proof of common-law documents will delay the processing of the member's pension.</i>			

Surplus Factor 80 This member has been laid off pursuant to the job security provisions of the Collective Agreement between the employer and the bargaining agent.	<input type="checkbox"/>
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Employer: _____

Employer Official's Name: _____ Telephone: (_____) _____
(Please Print)

Employer Official's Signature: _____ Date _____(DD/MM/YYYY)