

# Identifying Benefit Recipients (Retirement)



OPSEU Pension Trust      Fiducie du régime de retraite du SEFPO

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Please read the explanations on the reverse before completing this form.

**Important! This form REVOKES all previous designations. Please list all your benefit recipients.**

## 1 Your Identification

Social Insurance Number	Date of birth (DD/MM/YYYY)
_____	_____
Last name	First name and initial
_____	_____
Address	
_____	
Home tel no. ( )	E-mail
_____	_____

### Your marital status (check one)

Married     Separated     Divorced     Widowed     Single

## 2 When are you completing this form?

At retirement                       During retirement

## 3 Your Eligible Spouse (common-law or married)

Last name	First name	S.I.N.	Date of birth (DD/MM/YYYY)
_____	_____	_____	_____

Is this the same spouse you had when your pension started?     Yes     No

If no, have you applied for a survivor benefit?                       Yes     No

## 4 Your Eligible Children (under 18 or over 18 if in full-time school)

Last name	First name	S.I.N.	Date of birth (DD/MM/YYYY)
_____	_____	_____	_____

Last name	First name	S.I.N.	Date of birth (DD/MM/YYYY)
_____	_____	_____	_____

Last name	First name	S.I.N.	Date of birth (DD/MM/YYYY)
_____	_____	_____	_____

## 5 Payment Recipient

Last name	First name	S.I.N.
_____	_____	_____
Telephone number ( )	Date of birth (DD/MM/YYYY)	
_____	_____	
Last name	First name	S.I.N.
_____	_____	_____
Telephone number ( )	Date of birth (DD/MM/YYYY)	
_____	_____	

## 6 Declaration

I hereby declare that the information I provide is true and accurate. I authorize the use of this information by the OPSEU Pension Trust for the administration of the OPSEU Pension Plan. **This form must be signed and dated before we can accept and process it.**

Please check box  if you have attached additional information.                     

\_\_\_\_\_  
**Pensioner Signature**

\_\_\_\_\_  
**Date of Signature (DD/MM/YYYY)**

## Post Retirement Death

If You Die After Retirement

**Immediate pension to your Eligible Spouse**

If no Eligible Spouse

**Immediate pension to your Eligible Children**

If no Eligible Children

**Residual balance to your Payment Recipient**

If no Payment Recipient

**Residual Balance to your Estate**

### **Retirement:**

when a member starts receiving a pension.

### **Eligible Spouse :**

is one individual or another, 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.

To be eligible to receive automatic survivor benefits, the spouse must not be living separate and apart at the time the member terminated from the Plan and at the time the pension started.

### **Eligible Child(ren):**

Child(ren) who is: under the age of 18 **or** if over 18 years, is in continuous full-time attendance at a secondary school or post-secondary educational institution for up to five years following secondary school. There cannot be any break in the years of educational attendance.

### **Payment Recipient:**

The person(s) named by the member on this form to receive a residual balance if the member dies after retirement and has no eligible spouse or eligible child(ren).

### **Residual Balance:**

The pension contributions you made to the plan, plus interest, less all pension payments made from the plan to you and to your survivors.

If you would like more information please refer to the booklet "Your Pension and Your Beneficiaries" or our factsheet "Survivor Benefits and Minor Children". Both are available on our website at [www.opstrust.com](http://www.opstrust.com).

Personal information is collected on this form under the authority of Article 14.1 of the *Ontario Public Service Employees' Union Pension Plan*. This information will be used to determine eligibility for benefits and to document/process pension payments. Questions about this collection of information should be directed to the Director, Client Services, 12th floor, 1 Adelaide Street East, Toronto, Ontario M5C 3A7. These explanations and definitions were prepared by the OPSEU Pension Trust and provide summary and descriptive information about the OPSEU Plan for convenience. The administration of the OPSEU Plan remains governed by the *Ontario Public Service Employees' Union Pension Plan* and the provisions of the Plan prevail over this summary.