

GOOD *to* KNOW

QUICK FACTS
ON PROVING
YOUR SPOUSAL
RELATIONSHIP
JUNE 2020

How to Prove Your Spousal Relationship

As a member of the OPSEU Pension Plan (the Plan), your married or common-law spouse may be entitled to survivor benefits when you die. Before paying any benefits to your spouse, OPTrust will need to confirm that your spousal relationship meets the Plan's requirements.



When does OPTrust need proof of my spousal relationship?

You or your spouse will need to provide proof of your spousal relationship when you:

- end your employment
- change employers and move to another pension plan due to a divestment
- retire
- die

You will also be required to provide proof of your spousal relationship if you acquire a new spouse after you retire and apply to OPTrust to provide your post-retirement spouse with a survivor pension.



What documents does OPTrust need to help confirm my spousal relationship?

To help OPTrust determine whether your spouse qualifies for survivor benefits, we will need one (1) of the following documents to be completed:

- ✓ a **Confirmation of Marital Status** (this is included in the Pension Option Election package members receive when they end their membership in the Plan or retire).

OR

- ✓ a **Declaration of Spousal Relationship (OPTrust 1059)** completed by your spouse if you die before you retire.

Continued on next page.



Along with one of the forms listed above, OPTrust will also need the following documents:

If you are legally married:

- ✓ a copy of your marriage certificate if not already on file with OPTrust

If you have been living together in a common-law relationship for less than 3 years and are the parents of a child:

- ✓ A copy of a birth certificate or adoption papers for your child naming you both as parents
- ✓ One (1) document from the list below

If you have been living together in a common-law relationship for 3 years or more:

- ✓ Two (2) documents from the list below. One (1) of the two documents must be dated at least 3 years before your membership in the Plan ends.



List of common-law proof documents

- Copies of joint mortgage statements, property tax assessments, property or auto insurance or rental/lease agreements in both names for the shared address
- Copies of utility bills (e.g., hydro, water, gas, cable, telephone, internet) in both names for the shared address
- Copies of account statements (e.g., bank account, credit card, line of credit) in both names
- A legal will naming the other as spouse or partner
- Statements identifying either of you as the other's spouse under health/dental benefit plans, life or auto insurance policies, other pension plans or investment accounts (e.g., RRSP, TSFA)
- A valid Power of Attorney, naming the other as attorney and spouse or partner
- One of the following on file with OPTrust, naming the same spouse:
 - a Statement of Marital Status form (OPTrust 3007) or
 - a Pension Beneficiaries form (OPTrust 1015) or
 - information you provided through your Online Services account

OPTrust may request more information or consider documents other than those listed above.



For more information please contact OPTrust

This information is a summary of certain benefits offered under the primary schedule of the OPSEU Pension Plan and is not applicable to OPTrust Select. All information is current as of the date of publication.

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