



DECLARATION OF RESIDENCY STATUS

1 Adelaide Street East, Suite 1200
Toronto ON M5C 3A7

Telephone: 416-681-6100 Toll-free: 1-800-637-0024
Email: email@optrust.com Website: optrust.com

Complete this form and return it to OPTrust if you are receiving a pension from the OPSEU Pension Plan and you need to declare your place of residency for income tax purposes.

OPTrust will use the information you provide on this form to calculate the amount of tax required to be withheld from your pension based on your principal place of residence.

If your residency status changes, please notify OPTrust immediately.

A – Personal Information

Last Name

First Name

OPTrust ID or Employee Number

Email or Telephone

Date of Birth (Day-Month-Year)

Mailing Address

City/Town

Province, State or Territory

Postal or Zip Code

Country

B – Residency Status

Indicate which residency status applies to you by ticking (✓) the appropriate box:

I am a **resident** of Canada for income tax purposes.

(This applies to all individuals who live permanently in Canada and file Canadian income tax returns.)

I am a **non-resident** of Canada for income tax purposes.

(This applies if you normally live outside of Canada and do not file Canadian income tax returns.)

Please indicate the country where you are a resident:

If you are a non-resident of Canada, and your country of residence has a tax treaty with Canada, OPTrust may require additional documentation such as a completed Canada Revenue Agency "Declaration of eligibility for benefits (reduced tax) under a tax treaty for a non-resident person" (NR301) form before any tax changes can be applied.

C – Declaration

I certify that the information provided on this form is accurate and complete and I understand that the information I have provided on this form will be used to calculate the income tax withheld from my pension.

Signature

Date (Day-Month-Year)