

Membership Enrolment

PERSONAL INFORMATION

Mr Mrs Other **Member's Last Name** **First Name and Initials** Male
 Ms Miss Female

Marital Status: Single Married Common-law Former Last Name (if applicable)
 Separated/Divorced Widowed

Social Insurance Number Employee/WIN Number Date of Birth (DD/MM/YYYY)

Work Email Address Daytime Telephone Number

Home Email Address Home Telephone Number

Home Address: Number and Street Apt. No.

City/Town Province Postal Code

NOTE: If you have past eligible service with the Ontario Public Service or another employer and you want to purchase or transfer this past eligible service, please complete an *Application for Past Pension Service* form (OPTrust 1036), available from the OPTrust website.

Please indicate if the *Application for Past Pension Service* form is: Attached To follow Not applicable

CONSENT AND SIGNATURE

I consent to receive information from OPTrust electronically at the email address listed on this form. I understand that I will receive all documents and information relating to my membership in the OPSEU Pension Plan capable of being transmitted electronically via the email address on the form and that I will not receive a paper version of any document unless I specifically request it.

I do not consent to receive electronic information from OPTrust.

I consent to the collection and use by OPTrust of all the information in this form, and all attachments and information that OPTrust may request from me or my employer in conjunction with my enrolment in the OPSEU Pension Plan, for the purposes of determining eligibility for benefits and administering the OPSEU Pension Plan.

Member's Signature Date Signed (DD/MM/YYYY)

Information about OPTrust's privacy policy about the collection, use and disclosure of personal information is available on the reverse side of this form.

TO BE COMPLETED BY THE EMPLOYER

EMPLOYMENT INFORMATION

Employment Type: Full time Part time Plan Membership Date (DD/MM/YYYY) Continuous Employment Date (DD/MM/YYYY)
 Seasonal Fixed-term contract

Employer Former Member

Employer's Name (Please print) Business Telephone Number

Employer's Signature Date Signed (DD/MM/YYYY)

YOUR PERSONAL INFORMATION IS IMPORTANT TO OPTRUST

What is personal information?

Personal information is defined as information in any form or manner about an individual, whether or not recorded, that identifies the individual, can be manipulated to identify the individual, or can be linked to other information that identifies the individual.

How does OPTrust protect my personal information?

OPTrust has in place a privacy policy, principles and supporting processes which set out specific rights and obligations including, among others:

- advising individuals why their personal information is being collected and used
- outlining the circumstances or purposes under which it will be disclosed to third parties
- obtaining consent of the individual for such collection
- identifying uses and potential disclosure, and; ensuring that the information is not used or disclosed for other purposes without further consent.

Why does OPTrust collect and use personal information?

OPTrust uses your personal information to determine and calculate your pension benefit and ensure accurate calculations of your pension entitlements. We also need your personal contact information to be up-to-date so that we can contact you and also ensure that your survivor information is current. OPTrust will keep you informed about your pension and any changes that may affect you. For example, each year we send you an *Annual Pension Statement* and other communications which detail Plan provisions and provide other important information. We also let you know when there is an amendment to the Plan (such as the extension of an early retirement window or a change in your contribution rate) or about other pension or tax legislation changes. This is why we must have current mailing and email addresses for you.

Guiding principles of our privacy program

OPTrust carries out the privacy function based on the following principles:

- **Accountability:** OPTrust acknowledges that it is responsible for personal information under its control.
- **Identifying purposes:** OPTrust identifies the purposes for which personal information is collected at or before the time the information is collected.
- **Obtaining consent:** The consent of Plan members is required for the collection, use or disclosure of personal information (other than where disclosure is required by law). Consent may be express or implied from the circumstances (e.g., consent to use information for purposes of administering the Plan may be implied from a member's enrollment in the Plan).
- **Limiting collection:** OPTrust limits the collection of personal information to that which is necessary for purposes identified by OPTrust. Personal information is collected by fair and lawful means.
- **Limiting use, disclosure and retention:** OPTrust does not use or disclose personal information for purposes other than those for which it is collected, except with the consent of the individual or as required by law. OPTrust retains personal information only as long as necessary for the fulfillment of those purposes, or as required by law.
- **Accuracy of personal information:** OPTrust makes reasonable efforts to keep personal information as accurate, and complete as is necessary to fulfil the purposes for which the information is to be used.
- **Security safeguards:** OPTrust protects personal information with security safeguards appropriate to the sensitivity of the information.
- **Openness concerning policies and practices:** OPTrust makes readily available specific information about its personal information management policies and practices to its members and the public upon request. Questions or concerns of members will be addressed by OPTrust's Privacy Officer.
- **Access to personal information:** OPTrust informs members of the existence, use and disclosure of his or her personal information upon request, and gives the individual access to that information. A member or employee is given the opportunity to challenge the accuracy and completeness of their information and have it amended as appropriate.
- **Challenging compliance:** OPTrust will investigate any privacy complaints or inquiries and has procedures in place for ensuring that each complaint is considered and processed in a timely manner.

We will keep you informed

The use, collection and disclosure of member and pensioner personal information is very important to OPTrust. We continue to assess the impact of any business changes and ensure that our business practices meet or exceed the established standards. We will also keep you informed about any steps that we are taking in this regard. If you have any concerns or questions regarding OPTrust's privacy policies and procedures, please contact our Privacy Officer at **416 681-6161** or toll-free within Canada **1 800 906-7738** or by e-mail at **privacy@optrust.com**. For more information, download our booklet *Privacy Matters* at **optrust.com**.