

For Option 3 or 4, my Joint Payee is:

Full Name: _____ Relationship: _____
Surname Given Name

Date of Birth: _____ (Provide Copy of Birth Certificate)
Month Day Year

S.I.N.: _____

Date: _____ Signature of Member: _____
Month Day Year

FOR COMMITTEE USE ONLY

Date of Birth of Applicant - Verified _____

Date of Birth of Joint Payee - Verified _____

Effective Date of Pension: _____ Cause _____
Month Day Year

- Monthly Pension:
- 1. \$ _____ Life Guaranteed 5 years
 - 2. \$ _____ Life Guaranteed 10 years
 - 3. \$ _____ Joint Life & Last Survivor (60% to Spouse)
 - 4. \$ _____ Joint Life & Last Survivor (100% to Spouse)
 - 5. Integrated with Old Age Security,
 - Life Guaranteed - 5 years \$ _____
 - Temporary Pension to age 65 \$ _____
(ceasing on _____)
 - Total Pension up to age 65 \$ _____

APPROVAL OF:

Actuary -

Pension Committee -

Signature of Actuary

Signature (Pension Committee)

Date: _____
Month Day Year

Date: _____
Month Day Year

IBEW Local Union 773 Pension Plan

Registration #0349464

STATEMENT OF MARITAL STATUS

Name of Member:

Social Insurance Number: _____

DEFINITION OF SPOUSE

For purposes of the Plan, "Spouse" of a Member on any date means a person of the opposite sex to the Member or the same sex as the Member who:

(i) *is married to the Member, or*

(ii) *is not married to the Member but is living with the Member in a conjugal relationship*

(a) continuously for a period at least three years, or

(b) in a relationship of some permanence if they are the natural or adoptive parents of a child, both as defined in the Family Law Act, R.S.O. 1990, ch. F.3;

provided that for the purposes of this Plan, a person shall be deemed not to be the Spouse of a Member if the person is living separate and apart from the Member.

MARITAL STATUS – Check only one

I do have a Spouse as defined above

I have a Spouse as defined above, but we are living separate and apart

I do not have a Spouse as defined above

SPOUSE DATA

Name of Spouse

Spouse's Date of Birth

ASSIGNMENT OF PENSION – Check only one

As of the date of this statement, I certify that:

No part of my pension entitlement under this Plan has been assigned by agreement or court order as a result of a marriage breakdown.

A portion of my pension entitlement under this Plan has been assigned as a result of a marriage breakdown. A copy of the applicable agreement or court order is attached, or has been submitted previously to this Plan's administrator.

Signature of Member

Date

Signature of Witness

Name of Witness (Please Print)

IMPORTANT: If you have a Spouse as defined above and you do not choose one of the Joint & Survivor Pension options when you retire, a Spousal Waiver of Joint & Survivor Pension must be completed.