

**INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS  
LOCAL 773 PENSION PLAN (the "Plan")**

**REQUEST FOR TERMINATION ESTIMATE**

You may request a termination estimate if you are under age 50 and no pension contributions have been made on your behalf during the past 24 months.

The estimate will provide you with the amount of the cash value (commuted value) payable to you if you decide to terminate your membership in the Plan, as well as your monthly pension which is payable to you starting at age 60 (or as early as age 50, with reduction) if you decide to stay in the Plan. An Application for Termination Benefits will be included with the package indicating your payment options should you decide to terminate your membership in the Plan and receive the cash value of your pension based on the Plan's current funding level.

**The termination benefit will be calculated in accordance with the Plan Text and the Plan's transfer ratio in effect at the time your request is received.**

By completing the information below, you are requesting a termination estimate be provided to you.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

STREET

CITY

PROVINCE

POSTAL CODE

Email address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Attach proof of age (birth certificate, passport or driver's license)

Marital Status: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Attach Statement of Marital Status

I also certify that the above information is true, accurate and complete to the best of my knowledge and belief. I understand that the information provided by me on this Request for Termination Estimate form will be strictly used for the purpose of providing a termination estimate.

\_\_\_\_\_  
Member's Signature

\_\_\_\_\_  
Date

**Complete this form and forward it along with the required documentation to:**

Susan Bechard  
c/o I.B.E.W. Local 773, Employees Benefit Services  
4050 North Service Road East  
Windsor, ON  
N8W 5X2

**For Office Use**

Proof of age provided

Statement of marital status provided

\_\_\_\_\_  
Date of Last Contribution

\_\_\_\_\_  
Date Termination Request Received

**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.