



Canada

International Painters and Allied Trades Industry Pension Fund

Fiddlers Green Postal Outlet · PO Box 81032 · Ancaster Ontario L9G 4X1
Toll Free: (800) 554-2479 · Fax: (866) 656-4160
pension@iupat.org · www.iupat.org



Canadian Pension Application Packet



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Canadian Pension Application

Complete and submit this form to the Fund office along with the required necessary documents.

Section A: Applicant Information (The person to be paid – all fields must be completed.)

Name: _____ SIN: _____
First Middle Last

Address: _____
Street Name City Province/Territory Postal Code

Date of Birth: *Month* _____ *Day* _____ *Year* _____ Applicant's Mother's Maiden Name: _____

Phone Number: _____ Email: _____

- Relationship to the Participant with Pension Plan Benefits:
- Self/Participant – *complete entire application*
 - Surviving Spouse – *complete Sections A, B, and G*
 - Alternate Payee (spouse or child with a right to a payment under a court order) – *complete Sections A, B, and G*
 - Beneficiary (other than a surviving spouses) – *complete Sections A, B, and G*
 - Other (Guardian, Power of Attorney, etc. – attach an explanation and documents to show your legal authority) – *complete Sections A, B, and G*

Retirement Date: *Month* _____ *Day* _____ *Year* _____
(The earliest date benefits are payable is the first day of the month following the date in which your application is received.)

Section B: Participant Information (The person who worked and has Pension Plan benefits.)

Name: _____ SIN: _____
First Middle Last

Date of Birth: *Month* _____ *Day* _____ *Year* _____ Phone Number: _____

- Current Marital Status:
- Single
 - Married
 - Divorced
 - Widowed
 - Legally Separated
 - Married-Common Law Spouse

Last Affiliated District Council or Local Union: _____

Current or Last IUPAT Industry Plan Work (or intended last date):
Month _____ *Day* _____ *Year* _____ Employer: _____ Province: _____

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Section C: Canada (Quebec) Pension Plan Disability

Complete this section if you would like to apply for a Disability Pension, if eligible.

Date you first became disabled: Month _____ Day _____ Year _____

Have you applied for a Canada (Quebec) Pension Plan Disability? Yes No

If yes to the above, has the Pension Plan Disability application been approved? Yes No

If your Pension Plan Disability application has been approved, submit Canada (Quebec) Pension Plan Disability Benefit Award together with this application. This document must be received before benefits can be paid.

Section D: Spousal Information

Please also complete the attached *Declaration of Spousal Status* form. If you have a spouse as defined according to the form, please provide your spouse's information below.

Name: _____
First Middle Last

Address: _____
Street Name City Province/Territory Postal Code

Spouse's Date of Birth: Month _____ Day _____ Year _____ SIN: _____

Spouse's Marital Status:

Married, Not Separated Married, Separated – Date of Separation: Month _____ Day _____ Year _____

Common Law – Date of Commencement of Common Law Relationship: Month _____ Day _____ Year _____

Section E: Beneficiary Information

Complete this section if you do not have a spouse or if your spouse has waived his/her entitlement to a Joint and Survivor Benefit. Please note that by signing Section G of this application, you revoke any previous beneficiary designations and designate the following beneficiary to receive any remaining guaranteed pension payments upon your death.

Name: _____
First Middle Last

Address: _____
Street Name City Province/Territory Postal Code

Beneficiary's Date of Birth: Month _____ Day _____ Year _____ SIN: _____

Beneficiary's Relationship to Participant: _____

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Section F: Declaration of Spousal Status

Complete this section in the presence of a witness. Check all statements that apply to you. You must check at least one of the boxes below:

- I state under penalty of perjury that I am not legally married at this time.
- I state under penalty of perjury that I cannot locate my spouse. *You must include the name, Social Insurance Number and the last known address of your spouse in Section 4.*
- I state under penalty of perjury that I was previously married but am divorced and there is no order or agreement that requires payment of pension benefits to my former spouse. *You must attach a divorce decree and a copy of any property settlement agreement. This will be treated as confidential personal information.*
- I state under penalty of perjury that I was previously married and have attached all orders or agreements that require payment of pension benefits to my former spouse that have not previously been filed with the Fund office. *You must attach all orders or agreements on pension benefits that have not previously been sent to the Fund office.*
- I state under penalty of perjury that none of the above statements apply to me.

Applicant Signature

Date

Non-Relative Witness Signature

Date

Section G: Applicant Statement

I hereby apply for a pension from the International Painters and Allied Trades Industry Pension Fund (Canada). The statements contained in this application are true to the best of my knowledge and belief. I understand that a false statement may disqualify me for pension benefits and that the Trustees shall have the right to recover any payments made to me because of a false statement.

Applicant Signature

Date

Non-Relative Witness Signature

Date

Canadian Pension Application - Instructions

Please read this *Canadian Pension Application* carefully. Be sure to answer all questions and attach additional sheets if more space is needed.

Upon the completion of processing your application, if you are eligible for benefits, you will receive a determination letter and benefit election form which will indicate the amount of the respective benefit and pension options you are entitled to receive. There will be a detailed explanation of each option available and your benefit amount under each option. Upon your review of this information, you and your spouse, if any, will be asked to elect an option under which you would like your benefit paid. The types of retirement and payment options are described in your Summary Plan Description. **You do not have to elect a pension option at this time.**

If you are married on your retirement date, you will need the consent of your spouse to choose an option other than a form that provides lifetime benefits for your spouse or to choose a beneficiary other than your spouse.

Proof of Age Documentation

Proof of age for you and your spouse or beneficiary must be provided to the Fund office along with your application. The acceptable types of documentation are listed below in order of preference: (You may submit a photocopy of these documents.)

- A birth certificate
- A baptismal certificate or statement as to the date shown by a church record, certified by the custodian of such record
- Notification of registration of birth in a public registry of vital statistics
- Hospital birth record, certified by the custodian of such record
- A Medicare card or Certificate of Social Insurance award, if age or birth date is shown
- A signed statement by the physician or midwife who was in attendance at birth, as to the date of birth shown on their record
- Naturalization record
- Immigration papers

If you cannot submit proof of age in accordance with the items listed above, then you must submit at least TWO of the items listed below:

- Military record
- Passport
- Driver's license
- School record, certified by the custodian of such record
- Vaccination record, certified by the custodian of such record
- An insurance policy, which shows age or date of birth
- Other evidence such as notarized signed statements from persons who have knowledge of the date of birth

Canadian Pension Application - Checklist

Review the application checklist below to ensure you have enclosed all necessary documents before returning your application to the Fund office.

Documents Checklist

(Return these documents to the Fund office.)

- Completed Application
- Proof of Your Age *(Refer to the Proof of Age information contained in the instructions for a list of acceptable documents.)*
- Proof of Your Spouse/Beneficiary's Age *(Refer to the Proof of Age information contained in the instructions for a list of acceptable documents.)*
- Marriage or Divorce Certificate *(if applicable)*
- Declaration of Spousal Status Form
- Disability Award from Canada Pension Plan or Quebec Pension Plan *(if applicable)*

Return your *Canadian Pension Application* including all necessary documents to the following address:

International Painters and Allied Trades
Industry Pension Fund
Fiddlers Green Postal Outlet
PO Box 81032
Ancaster Ontario L9G 4X1

Use this form to confirm whether or not the Participant has an eligible spouse (married or common-law) both at the time of his/her enrollment into the Plan and at time of his/her retirement. This declaration is to be signed by the Participant.

(Updated May 1, 2006)

Section 1: Participant Information

Name of Participant:

First Name (Print)

Last Name (Print)

Section 2: Definition of Spouse

The term "**Spouse**" is defined by the legislation of the province in which you are or were **employed**. You are considered to be employed in the province in which you report to work.

PLEASE READ THE APPLICABLE DEFINITION OF "**SPOUSE**" CONTAINED ON THE LAST PAGE OF THIS DOCUMENT PRIOR TO COMPLETING THE SECTIONS BELOW.

For the purposes of this declaration, all references to the term "**Spouse**" also includes a "**Common-Law Partner**" and a "**Cohabiting Partner**" as defined on the last page of this document, where applicable.

Please note that if you are **married**, you are considered to have a "Spouse" even if you are separated **unless** otherwise specified in the definition of "Spouse" applicable to you.

NOVA SCOTIA Participants Only:

If this declaration is being made at the time of your retirement, you are **not** considered to have a "**Spouse**", if you are **living separate and apart** from your "Spouse" at the time of your retirement.

Section 3: Declaration of Spousal Status

I have read and understand the definition of "Spouse" which is applicable to me.

Based on the definition of "**Spouse**", as of the date of this declaration,

- I declare that:
- I have a Spouse
- I do **not** have a Spouse

Section 4: Spousal Information

If you have a Spouse, please provide the following information:

Name of Spouse: _____ (First Name / Last)

Birth Date of Spouse: _____ (Month / Day / Year)

Married Common-Law

Section 5: Signature

I make this solemn declaration conscientiously believing it to be true, and knowing that it is of the same force and effect as if made under oath.

Witness:

Signature of Declarant

Signature of Witness

Name of Declarant (Print)

Name of Witness (Print)

DATED this _____ day of _____, 200_____ .

Spouse Definitions

Alberta (Effective June 1, 2003).

"Spouse" means,

- (a) a person who, at the relevant time, was married to the Participant and had not been living separate and apart from the Participant for 3 or more consecutive years, or
- (b) if there is no person to whom paragraph (a) applies, a person who, immediately preceding the relevant time, had lived with the Participant in a conjugal relationship
 - (i) for a continuous period of at least 3 years, or
 - (ii) of some permanence, if there is a child of the relationship by birth or adoption.

British Columbia (Effective July 15, 1999).

"Spouse" means,

- (a) a person who at the relevant time was married to the Participant, and who, if living separate and apart from the Participant at the relevant time, did not live separate and apart from the Participant for longer than the 2 year period immediately preceding the relevant time, or
- (b) if paragraph (a) does not apply, a person who was living and cohabiting with the Participant in a marriage-like relationship, including a marriage-like relationship between persons of the same gender, and who had been living and cohabiting in that relationship for a period of at least 2 years immediately preceding the relevant time.

Manitoba (Effective June 30, 2004).

"Spouse" means the person who is married to the Participant.

"Common-Law Partner" means

- (a) a person who, with the Participant, registered a common-law relationship under section 13.1 of *The Vital Statistics Act*, or
- (b) a person who, not being married to the Participant, cohabited with him or her in a conjugal relationship
 - (i) for a period of at least three years, if either of them is married, or
 - (ii) for a period of at least one year, if neither of them is married.

New Brunswick (Effective June 27, 1987).

"Spouse" means either of a man and a woman who

- (a) are married to each other,
- (b) are married to each other by a marriage that is voidable and has not been avoided by a declaration of nullity,
- (c) have gone through a form of marriage with each other in good faith that is void and have cohabited within the preceding year, or
- (d) not being married to each other, have cohabited
 - (i) continuously for a period of not less than three years in a conjugal relationship in which one person has been substantially dependent upon the other for support, or
 - (ii) in a relationship of some permanence where there is a child born of whom they are the natural parents, and have cohabited within the preceding year;

Ontario (Effective June 13, 2005).

"Spouse" means a person who is,

- (a) married to and is not living separate and apart from the Participant, or
- (b) is not married to the Participant and is living together in a conjugal relationship with the Participant,
 - (i) continuously for a period of not less than 3 years, or
 - (ii) 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 (Ontario).

Newfoundland (Effective December 13, 2001).

"Spouse" means, if the Participant does not have a Cohabiting Partner, a person who

- (a) is married to the Participant,
- (b) is married to the Participant by a marriage that is voidable and has not been voided by a judgment of nullity, or
- (c) has gone through a form of a marriage with the Participant, in good faith, that is void and is cohabiting or has cohabited with the Participant within the preceding year.

"Cohabiting Partner", means

- (a) in relation to a Participant who has a spouse, means a person who is not the spouse of the Participant who has cohabited continuously with the Participant in a conjugal relationship for not less than 3 years, or
- (b) in relation to a Participant who does not have a spouse, means a person who has cohabited continuously with the Participant in a conjugal relationship for not less than 1 year, and is cohabiting or has cohabited with the Participant within the preceding year;

Nova Scotia (Effective June 4, 2001).

"Spouse" means

- (a) either of a man and woman who
 - (i) are married to each other,
 - (ii) are married to each other by a marriage that is voidable and has not been annulled by a declaration of nullity, or
 - (iii) have gone through a form of marriage with each other, in good faith, that is void and are cohabiting or, if they have ceased to cohabit, have cohabited within the 12 month period immediately preceding the date of entitlement, or
- (b) if there is no person to whom paragraph (a) applies, an individual who has registered a domestic-partner declaration with the Participant under the Vital Statistics Act (Nova Scotia) which has not been terminated in accordance with such act.

"Common-Law Partner" of a Participant means an individual who has cohabited with the Participant in a conjugal relationship for a period of at least 2 years, neither of them being a Spouse.

Quebec (Effective June 24, 2002).

"Spouse" means, the person who,

- (a) is married to, or in a civil union, with the Participant, and is not separated from bed and board from the Participant, or
- (b) has been living in a conjugal relationship with a Participant who is neither married nor in a civil union, whether the person is of the opposite or the same sex,
 - (i) for a period of not less than 3 years, or
 - (ii) for a period of not less than 1 year if:
 - (A) at least one child is born, or to be born, of their union; or
 - (B) they have adopted, jointly, at least one child while living together in a conjugal relationship; or
 - (C) one of them has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

Saskatchewan (Effective July 6, 2001).

"Spouse" means:

- (a) a person who is married to the Participant; or
- (b) if a Participant is not married, a person with whom the Participant is cohabiting as spouses at the relevant time and who has been cohabiting continuously with the Participant as his or her spouse for at least one year prior to the relevant time.