

PENSION ENTITLEMENT QUESTIONNAIRE

Created by Gmeiner Actuarial Services Inc.

Name of Plan Member:			
Sex:		Date of Birth:	
Date of Employment:		Date of Plan Entry:	
Date of Marriage (or Cohabitation):		Date of Separation:	
Years of Credited Service between Date of Marriage and Date of Separation:			
Member's Annual Rate of Pay in the Year of Separation:			
Name of Pension Plan:			
Type of Pension Plan (check one):			
<input type="checkbox"/> Career Average		<input type="checkbox"/> Money Purchase	
<input type="checkbox"/> Best or Final Average		<input type="checkbox"/> Flat Benefit	
<input type="checkbox"/> Other (please specify and attach a copy of the employee booklet or plan text)			
If the plan is "Career Average", please indicate the last base year update:			
Please specify the pension plan formulae (separate into pre-age 65 entitlement and post-age 65 entitlement):			
Please specify the employee contribution rate (if employees contribute to the plan):			
For other than money purchase plans, please specify the amount of annual pension based on service to:			
	Benefit for Pre-Reform Service	Benefit for Post-Reform Service	Total
Date of Marriage:			
Date of Separation:			
Does this pension reduce at age 65 or some other age to allow for C/QPP and/or OAS Benefits? If so, by how much?			
Please specify the employee contributions with interest for service to:			
	Accumulated Contributions for Pre-Reform Service	Accumulated Contributions for Post-Reform Service	Total
Date of Marriage:			
Date of Separation:			
For money purchase plans, please specify the employer contributions with interest for service to:			
	Accumulated Contributions for Pre-Reform Service	Accumulated Contributions for Post-Reform Service	Total
Date of Marriage:			
Date of Separation:			
Normal Form of Pension at Retirement:			
For Single Members:			
For Members with Spouses:			
Retirement Age:	Normal Retirement Age: Earliest Age at which an unreduced pension is payable: Minimum Service required to receive unreduced pension:		
Indexing: Does this pension include any provision for indexing?	Yes ()	No ()	
If Yes:	When does Indexing start?		
	What Indexing formula is used?		
	Is there a maximum level of Indexing in any one year?		
<u>If the Plan does not provide contractual Indexing, please indicate the frequency with which Ad Hoc increases have been provided in the past:</u>			
<u>Please indicate the Vesting provisions of the Plan:</u>			
Pre-Retirement Death Benefit:			
Is a Survivor's Pension payable?			
If so, what percentage:			
Please specify the Death Benefit for single Plan Members:			

A copy of the most recent version of the plan text or pension booklet, together with any subsequent amendments is required to ensure proper calculation of the Marriage Breakdown Value.