

RETIREMENT PLAN OF THE UNIVERSITY OF ST. MICHAEL'S COLLEGE

DECLARATION OF MARITAL STATUS

Please **print clearly**. Return the duly completed **original form** and keep a copy for your records.

SECTION 1 – PERSONAL INFORMATION

Member's last name	Member's first name and initials	YYYY	MM	DD
Employee number or other identification number				

SECTION 2 – DECLARATION OF MARITAL STATUS

Referring to the definition of "Eligible spouse" that you will find on the back of this form, **check the applicable box** and provide the requested additional information.

I hereby solemnly declare that, as of the date of this declaration, I have the following marital status:

- I do not have an eligible spouse
- I do have an eligible spouse – Attach a proof of age for your spouse

Name of spouse	<input type="checkbox"/> M <input type="checkbox"/> F	YYYY	MM	DD
	Gender	Date of birth		

SECTION 3 – DECLARATION OF PENSION ENTITLEMENT ASSIGNMENT

I hereby solemnly declare that, as of the date of this declaration: (**check the applicable box**)

- No part of my pension entitlement under the Plan has been assigned by an agreement or court order as a result of marital breakdown; **or**
- A portion of my pension entitlement under the Plan has been assigned to my former spouse by an agreement or court order as a result of marital breakdown. (**check the applicable box**)
 - The partition has already been carried out, or my former spouse and I have decided not to request the partition of my pension entitlement under the Plan; **or**
 - I hereby request that the partition be carried out, and for this purpose, I attach a copy of the agreement or court order.

SECTION 4 – CERTIFICATION AND SIGNATURE

I understand that the status of eligible spouse is established **on the date on which payment of my pension begins**. Accordingly, if my situation changes before payment of my pension begins, I must give a written notice of the change to the administrator.

I also understand that, for the purposes of the Plan, this declaration should not be interpreted as automatically creating rights in favour of the person I have declared as my eligible spouse, if applicable. Upon my death, the facts will be examined to determine who is entitled to receive death benefits.

I certify that all information provided on this form is accurate, complete and true. I understand that I, and my successors, will be responsible for any inaccurate, false or incomplete information.

Member's signature	YYYY	MM	DD
	Date		

THE RETIREMENT ANNUITY PLAN FOR EMPLOYEES OF THE ONTARIO MUTUAL
INSURANCE ASSOCIATION AND MEMBER COMPANIES

DECLARATION OF MARITAL STATUS

DEFINITION OF ELIGIBLE SPOUSE

The definition below is intended to identify the person qualifying as your eligible spouse upon your retirement under the applicable legislation. The possible impact of either a marital breakdown or a division of your pension benefits following a post-retirement marital breakdown is not taken into account.

Note: The applicable definition of eligible spouse depends on the member's "province of employment". Your "province of employment" is the one in which the establishment of your employer where you report to work is located or, if you do not report to any establishment of your employer, the province from which you receive your remuneration. If your employment is covered by the federal *Pension Benefits Standards Act, 1985*, the applicable definition is the "Federal" definition.

Your **eligible spouse** is the person who:

In Ontario,

- a) is married to you; or
- b) has been living with you in a conjugal relationship continuously for not less than three years, or in a relationship of some permanence if you are the parents of a child as set out in section 4 of the *Children's Law Reform Act*.

To be eligible for a benefit following your death, the person you are married to must not live separate and apart from you at the date of your retirement.

Important: This definition has been simplified to help the reader. In case of discrepancy between the definition above and the definition in the plan text and the applicable pension legislation, the latter shall prevail.