



# Pension Portability Information Request

You can make this change online through PLANet (some legislative restrictions may apply). Or, mail the **original completed and signed form** to MEPP.

## 1 Tell Us About You (Please Print)

Social Insurance Number: ! Please proceed to next field using the Tab button

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Last Name: First Name & Initial:

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Birthdate (dd/mm/yyyy):        /        /

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Primary Phone Number: Email Address:

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Mailing Address:

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City/Town/Village: Province: Postal Code:

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Name of Previous Employer's Pension Plan (Exporting Pension Plan):

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Phone Number:

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Mailing Address:

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City/Town/Village: Province: Postal Code:

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Previous Employer:

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Current Employer: Date of Hire:

## Member Authorization for Transfer of Information

As a member of the Municipal Employees' Pension Plan (MEPP), I request that the administrators of the exporting pension plan and MEPP submit a transfer **estimate** for my consideration to determine if I want to transfer pension money and pensionable service from the exporting plan to MEPP.

I understand that the personal information supplied will be handled in a confidential manner and will be given only to those persons authorized to process my application.

Signature of Member \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
day                    month                    year





### 3 To be completed by MEPP

Importing Plan: **Municipal Employees' Pension Plan**

Registration Number: **0355321**

MEPP Member Number:

Amount required to purchase Total Pensionable Service available for transfer by exporting plan:

Amount required to purchase remaining service:

Pensionable Service that can be purchased in MEPP by transfer amount:

Past Service Pension Adjustment (PSPA) if any:

### Certification by the Administrator of the Importing Plan

Name of Plan Administrator: **Municipal Employees' Pension Plan**

Title: **Pension Information Officer**

Phone Number: **1-877-506-6377**

I hereby certify that the information given above is correct according to our records.

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
day month year

Authorized Signature of Plan Administrator

### 4 Member's Acceptance of Transfer

#### Time Limit:

To initiate a transfer under this Portability Agreement, this signed form must be returned to MEPP no later than 30 days from the date of the signature by MEPP in Section 3 of this document. If you do not wish to proceed with the transfer, please return the form to MEPP.

#### Acceptance:

I have reviewed the information provided to me and have sought clarification where necessary, and;

I hereby authorize the administrator of the exporting plan to transfer the amount shown in Section 2 to MEPP, and release the administrator of the exporting plan from all responsibility for the amounts transferred to MEPP.

I understand that:

- a) the amounts transferred to MEPP under this agreement are subject to the locking-in provisions of MEPP and the benefits will be paid in accordance with the provisions of MEPP;
- b) the information supplied in this form is an estimate and the final amounts will not be determined until the date of transfer and a confirmation of these values will be given to me; and
- c) upon transfer pursuant to this Portability Agreement neither I nor any other persons (spouse, heirs or executors) who may have an entitlement pursuant to the service being transferred, have any right or entitlement under the exporting plan with respect to the service that was transferred.

**OR**

I choose not to transfer my pension and service at this time.

**In witness whereof** I have signed this application:

Signature of Member

Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
day month year

Print Name

Signature of Witness (must **not** be spouse or any beneficiary)



## Glossary

**Current Employer** – your present Municipal Employees' Pension Plan (MEPP) participating employer.

**Defined Benefit Pension Plan** - A pension plan that provides a benefit based on a formula.

**Eligibility Service** – the number of years and fractions of years that you were employed with your former employer including the time that you were employed but not contributing to the pension plan.

**Importing Plan** – MEPP, which is the pension plan of your present employer.

**Locking-In** – refers to the point at which you become vested in the Plan. Locked-in contributions and interest must be used to provide pension benefits at retirement and cannot be withdrawn as cash. In MEPP, if you terminate employment prior to retirement, locked-in money must be used to establish a deferred pension or transferred to a locked-in retirement account (LIRA).

**Pension Adjustment (PA)** – a lump-sum value of benefit entitlement earned during the year.

**Pension Adjustment Reversal (PAR)** – a reinstatement of personal Registered Retirement Savings Plan (RRSP) room when the benefit paid from the pension plan is less than the sum of the Pension Adjustments.

**Pensionable Earnings** – earnings on which pension contributions were made.

**Pensionable Service** - Service used in a pension calculation to determine a member's pension benefit.

**Portability Agreement** – an individual agreement between two registered pension plans that allows you to transfer pension benefits and service from one registered pension plan to another when you change employers.

**Previous Employer** – your employer before you became a municipal employee and joined MEPP.

**Past Service Pension Adjustment (PSPA)** – the reduction of RRSP room as a result of purchasing pensionable service under the importing plan.