

Pension Portability Information Request

Complete this form when you wish to transfer pension contributions or credits to PEPP from the pension plan of a former employer. This form is designed based on Saskatchewan legislation. Please contact PEPP if you are or were working outside Saskatchewan as your pension may be subject to the legislation of another province.

1 Tell us about you	Member Number: _____	Mailing Address: _____
	Last Name: _____	City: _____
	First Name & Initial: _____	Province: _____
	Birth Date (day/month/year): _____	Postal Code: _____
	Primary Phone Number: _____	
	Email Address: _____	

2 Pension Portability Information Request <small>(to be completed by the member)</small>	<p>I, _____, hereby request that the administrators of the Exporting Plan and the Public Employees Pension Plan submit for my consideration a transfer estimate so that I may determine if I wish to transfer pension contributions or credits from the Exporting Plan to the Public Employees Pension Plan.</p> <p>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.</p>
	<p>Member's Signature (electronic signature will not be accepted) _____ Date (day/month/year) _____</p>

3 Exporting Plan Administrator	Former Employer Name: _____
	Registration Number: _____ Termination Date (day/month/year): _____
	Total Employment Service: _____ years _____ days
	Total Pensionable Service: _____ years _____ days
	Dollar Amount Available for Transfer: _____
	plus
	Any amount over prescribed limit or transfer from a defined benefit plan to a defined contribution plan:
	The Pension Adjustment Reversal (PAR), if any: _____
	Total Estimated Transfer Amount:: _____
	Date of Calculation of Dollar Amounts (day/month/year): _____
<p>A transfer of funds would be in full satisfaction of all remaining benefits under the pension plan in respect of the period of pensionable service indicated above. Yes No</p> <p>Attach a list of the following historical information by year:</p> <ul style="list-style-type: none"> i Pensionable earnings, annualized. ii Pensionable service. iii Annual pension adjustment (PA) reflecting all past service events up to date of transfer. 	
<p>CERTIFICATION BY THE ADMINISTRATOR OF THE EXPORTING PLAN</p> <p>I hereby certify that the information given above is correct according to our records.</p> <p>Authorized Signature of Plan Administrator _____ Contract Number _____ Date (day/month/year) _____</p> <p>Name of Administrator (please print) _____ Title _____</p>	

4 Administrator Public Employees Pension Plan	<p>Public Employees Pension Plan Participating Employer</p> <p>Name: _____ PEPP Registration Number: 0578179</p> <p>Total Pensionable Service that can be transferred: _____ years _____ days</p>
	<p>CERTIFICATION BY THE ADMINISTRATOR OF THE PUBLIC EMPLOYEES PENSION PLAN</p> <p>Authorized Signature of Plan Administrator _____ Date (day/month/year) _____</p> <p>Name of Administrator (please print) _____ Title _____</p>

Member's Acceptance of Transfer

I authorize the administrator of the Exporting Plan to transfer the total estimated transfer amount shown in Section 3 to the Public Employees Pension Plan, and hereby release the administrator of the Exporting Plan from all responsibility concerning the amounts transferred by the Exporting Plan to the Importing Plan.

I understand that:

- a) the amounts transferred to the Public Employees Pension Plan under this agreement are subject to the Locking-In provisions of the Exporting Plan and the benefits will be paid in accordance with the provisions of the Importing Plan;
and
- b) the information supplied in this form is an estimate and that 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 person (spouse, heirs or executors) who may have had an entitlement pursuant to the service being transferred has no right or entitlement to the Exporting Plan with respect to the service that was transferred.

IN WITNESS WHEREOF I have signed this application

Signature of Member (electronic signature not accepted) **Signature of Witness** (electronic signature not accepted)

 Date (day/month/year)

Time Limit

To initiate a transfer under this portability agreement, you must sign and return this form to the Public Employees Pension Plan, not later than 30 days from the date of the signature by the Public Employees Pension Plan Administrator in Section 4.

Glossary

Public Employees Pension Plan Participating Employer

The employer under which you are currently employed and are a member of the pension plan.

Defined Benefit Plan

A type of pension plan where your retirement benefit is typically based on a formula calculated with your earnings and years of pensionable service.

Defined Contribution Plan

A type of pension plan where your retirement benefit is based on the amount in your individual pension account on the day you retire.

Employment Service

Your total years of service under your former employer while you were employed but not necessarily in the pension plan for all of the years.

Former Employer or Exporting Plan

The employer under which you were formerly employed and are considering transferring service you had accrued while there.

Locking In

Since pension plans are designed for retirement savings, each plan has provisions which lock-in your benefits so that you have to receive them as a retirement income instead of refunded in cash.

PA

A pension adjustment is an estimate of the notional value in registered retirement savings plan (RRSP) money of the benefits you earned in the pension plan during the year.

PAR

A pension adjustment reversal represents a reinstatement of personal registered retirement savings plan (RRSP) room when the benefit paid from the plan is less than the sum of the PA's.

Pensionable Earnings

Your gross earnings paid to you by your employer.

Pensionable Service

Your total service earned under your former employer while you were making contributions and earned a pension benefit under the pension plan.

Portability

The movement of pension benefits from one registered pension plan to another when you change employers.

Prescribed Limit

Canada Revenue Agency (CRA) limits the amount of money that you can tax shelter. This limit is calculated at the date of transfer based on your age, pension that you have earned, and a factor that CRA provides. Any amount over this limit must be paid in cash.

PSPA

A past service pension adjustment is the required reduction in your registered retirement savings plan (RRSP) to purchase the pensionable service under the Importing Plan.