

# University of Ottawa Retirement Pension Plan

## Spousal Declaration and Beneficiary Designation

Please read the instructions on the back before completing this form.

### SECTION 1 - MEMBER IDENTIFICATION

FIRST NAME	LAST NAME	EMPLOYEE NUMBER 100
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### SECTION 2 - SPOUSAL DECLARATION

I, the undersigned, declare that: *(complete section A or B)*

#### A. I HAVE A QUALIFYING SPOUSE (SEE THE BACK OF THIS FORM):

I AM MARRIED

I HAVE A COMMON-LAW SPOUSE

SPOUSE'S NAME: \_\_\_\_\_

SPOUSE'S DATE OF BIRTH: \_\_\_\_\_

DATE OF MARRIAGE OR START OF COMMON-LAW RELATIONSHIP: \_\_\_\_\_

#### B. I DO NOT HAVE A QUALIFYING SPOUSE:

I AM SINGLE

I AM WIDOWED

I AM SEPARATED

I AM DIVORCED

DATE OF SEPARATION OR DIVORCE: \_\_\_\_\_

IS THE DIVISION OF PENSION ASSETS ADMINISTERED BY THE UNIVERSITY? YES NO

### SECTION 3 - BENEFICIARY DESIGNATION

In accordance with pension benefits legislation and the University of Ottawa Pension Plan text, upon the death of a member, the survivor pension benefit payment will be paid in order of entitlement:

- To the member's qualifying spouse;
- To the member's dependent children, if the member or the member's qualifying spouse receives the pension at the time of his/her death.
- To the designated beneficiaries; or
- To the member's estate.

Your spouse qualifies for the survivor pension benefits if, on your death, both of the following conditions are met:

- Your spouse meets the definition of spouse as outlined in the Plan text, and
- Your spouse has not waived death or survivor benefits.

▷ If you die **before the commencement of your pension**, and you do not have a qualifying spouse, the survivor pension benefit will be paid to:

- Your designated beneficiaries; or
- To your estate

▷ If you die **after the commencement of your pension**, and you do not have a qualifying spouse, the survivor pension benefit will be paid to:

- Your dependent children (as defined in the Plan text), they have priority for the remaining guarantee period or survivor pension, or;
- To your designated beneficiaries; or
- To your estate

The survivor pension benefit payable to your designated beneficiaries or to your estate represents the residual of the guarantee period.

**I revoke all previous beneficiary designations and designate the following beneficiaries to receive, in equal shares unless specified otherwise, any amount payable relating to the University of Ottawa Pension Plan:**

Designated Beneficiaries			
Name (first and last)	Relationship to member	Date of birth (dd/mm/yyyy)	Percentage of benefit
		_____ DAY MONTH YEAR	%
		_____ DAY MONTH YEAR	%
		_____ DAY MONTH YEAR	%
		_____ DAY MONTH YEAR	%

If you want to name more than four beneficiaries, please attach a separate form. If you wish to designate a beneficiary who is a minor or an individual who is not able to manage his or her affairs, you should seek legal advice

### SECTION 4 - DECLARATION (you must complete this section)

I, the undersigned, declare that the information provided by me on this form is true and accurate. I understand that this is an important legal document. I understand that the University of Ottawa relies on the information I have provided and that by providing false or inaccurate information, my designation(s) might be invalid and lead to a change in my pension benefits. I understand I am responsible for notifying the University of Ottawa of any change in my civil status or if there is a legal agreement (e.g., separation agreement), arbitration award or court order affecting spousal rights or assigning a portion of my pension entitlement. I agree to provide any additional information requested by the University of Ottawa in support of the information provided on this form, and I understand that my failure to do so might affect the declarations and designations made on this form and my pension benefits. I reserve the right to revoke my designation of beneficiary above. I acknowledge that all designations of beneficiaries remain in effect until they are revoked by me in writing.

\_\_\_\_\_  
SIGNATURE OF PENSION PLAN MEMBER

\_\_\_\_\_  
DATE

Please note that the official documents to which your pension benefits are subjected to, such as the policies, documents, contracts, applicable laws and official pension plan text, have precedence over the information displayed in this form.

**Notice of Collection of Personal Information:** In accordance with the *Freedom of Information and Protection of Privacy Act* (Ontario) and with University [Policy 90](#), your personal information is collected under the authority of the University of Ottawa Act, 1965. Your personal information collected by Human Resources (Pension Sector) will be used for the purpose of and those consistent with the administration of your pension plan. If you have questions about the collection, use and disclosure of your personal information in this notice, please contact Human Resources, Pension Sector, 550 Cumberland Street, Room 019, Ottawa, Ontario K1N 6N5, Tel.: 613-562-5832 or [hropension@uOttawa.ca](mailto:hropension@uOttawa.ca).

## Human Resources – Pension Plans

550 Cumberland, Room 019 Ottawa ON K1N 6N5

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**PURPOSE**

This form is used to determine your spouse's or designated beneficiary's eligibility for Pension Plan death benefits. You must complete this form whenever necessary, including:

- when you enroll in the Pension Plan; or,
- when you begin receiving pension benefits; or,
- to declare a change in your civil status (before or after you begin receiving pension benefits); or,
- to change or update your beneficiary designation (before or after you begin receiving pension benefits); or,
- if you apply to add a survivor pension benefit (after you begin receiving pension benefits).

**DEFINITIONS**

**Spouse:** means a person who, at the time a determination of spousal status is required:

- (a) is legally married to the Member and is not living separate and apart from the Member; or
- (b) is not married to the Member but has been cohabitating with the Member in a conjugal relationship continuously for a period of not less than 1 year; or
- (c) is not married to the Member but has been cohabitating with the Member in a conjugal relationship of some permanence, if they are the parents of a child as set out in section 4 of the Children's Law Reform Act,

provided that the person also qualifies as a spouse or common-law partner of the Member as those terms are defined at the relevant time under the Income Tax Act for the purposes of registered pension plans.

For greater clarity, a Spouse, as defined above, must meet this definition on the date the Member commences Retirement on pension or the Member's date of death, if earlier, in order to be eligible to receive a survivor pension.

The Spouse of a Member who has retired on pension prior to January 1, 1994, shall be eligible for a survivor pension if the Spouse meets this definition prior to the date of death of the Member. This provision shall apply in the case of the Member with a Spouse of the same sex if the Member was in receipt of pension on or after January 1, 1999.

***If your marital status changes after the commencement of your pension benefits***

If you have begun receiving pension benefits after December 31, 1993 and you married or became a common law spouse after this date, you can choose to have a portion of your pension paid to your spouse following your death, provided that **all** of the following conditions are met:

- a) you did not have a qualified spouse on the date of the first pension benefit payment, or, if you did, this person died or this person waived his or her rights to the survivor pension following a marriage or spousal relationship breakdown, in accordance with the Pension Benefits Act and as documented in a legal document; and,
- b) there is no court order, arbitration award or agreement affecting your pension pursuant to applicable family law in connection with the breakdown of your marriage or spousal relationship; and,
- c) any other relevant requirements of the Pension Benefits Act are met.

*Note: You can only choose to do this within one year of your spouse first qualifying under the terms of the Pension Plan. To provide the survivor pension, your pension will be adjusted so that your pension prior to making this choice is of the same actuarial value as your pension and your survivor's pensions afterwards. The pension payable to your spouse cannot exceed the pension you were receiving immediately before your death.*

**Division of pension assets:**

The division of pension assets following a marriage breakdown, separation or divorce, as set out in a separation agreement, a court order, arbitration award or divorce decree. Since January 1, 2012, the valuation and division of pension assets must comply with the Ontario Family Law Act and the Pension Benefits Act and related regulations. If the University is administering the pension division, please attach a copy of your documents.

**Child or Children:** refers to a Child of a deceased Member, whether natural or adopted, who is dependent on the Member at the time of retirement, and who is at the time of any benefit payment:

- (a) under the age of 19 and will not attain the age of 19 in the calendar year that the Member's death occurs; or
- (b) in full-time attendance at an educational institution and is under the age of 27; or
- (c) dependent on the Member by reason of mental or physical infirmity

**SECTION 1**

Complete the information required

**SECTION 2**

Check the option that applies to you and provide a copy of your birth certificate or a valid legal document that has your name and date of birth as a proof of age.

**SECTION 3**

Read this page prior to adding beneficiaries. Please note that you cannot change the name of the beneficiaries or add them using a power of attorney. For a designated beneficiary who is a minor residing in Quebec, the surviving parent is usually the guardian of his or her property.

**SECTION 4**

Always complete the Signature section. If your form is not signed and dated, the information is incomplete or false or supporting documentation is missing, your benefit entitlement might be affected.

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