

Application to Purchase Pension Credit

Public Service Pension Plan (PSPP)

Read our booklet, *Understanding Your Pension Credit*, before filling out this form. Complete a separate application for any additional periods of service.

IMPORTANT: please read page 2 for information on required supporting documents.

OPB client number

OPB Client Information

OPB client last name (please print)		OPB client first name		Initials
<input type="text"/>		<input type="text"/>		<input type="text"/>
Apt. number	Street address			
<input type="text"/>	<input type="text"/>			
City	Province	Postal code	Contact telephone number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Service information - if exact dates are unknown, enter approximate dates.

I am applying to purchase pension credit for the following period of service:

- ☐ **1. Non-contributory** - worked for a PSPP employer, but did not contribute
Please submit your completed application to the employer the service is with and ask them to submit it along with the *Service Report for Non-Contributory Buybacks*.

Period of service from (YYYY/MM/DD)

Period of service to (YYYY/MM/DD)

- ☐ **2. Leave of absence** - took leave without pay for more than one month, but did not contribute for leave.

Period of service from (YYYY/MM/DD)

Period of service to (YYYY/MM/DD)

- ☐ **3. Reinstatement** - was a member of the PSPP (or a predecessor plan) and received the commuted value or a refund.

Period of service from (YYYY/MM/DD)

Period of service to (YYYY/MM/DD)

- ☐ **4. Non-OPS registered Canadian pension plan**

Period of service from (YYYY/MM/DD)

Period of service to (YYYY/MM/DD)

- ☐ **5. Deferred pension entitlement** - with OPSEU Pension Trust

Period of service from (YYYY/MM/DD)

Period of service to (YYYY/MM/DD)

Sign and date

<p>_____</p> <p>OPB Client Signature</p>	<p>Date signed (YYYY/MM/DD)</p> <p><input type="text"/></p>
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Required supporting documents

We cannot provide a cost quote without all required supporting documents. The cost quote will be based on your salary rate on the date all information is received.

1. Non-contributory service

Have your Employer submit your completed application when they submit the *Service Report for Buybacks* transaction/form.

2. Leaves of absence, or 3. Reinstatement

- If you are applying to purchase a leave of absence, strike, transfer top-up, or to reinstate a period of prior membership in the PSPP where you removed your benefit from the Plan, supporting documents are already on file.
- If you are applying to reinstate a period of prior membership in the OPSEU Pension Plan where you removed your benefit from the Plan, please submit the information required under 4. *Non-OPS registered Canadian pension plan*.

4. Non-OPS registered Canadian pension plan

If you are applying to purchase pension credit for a period of service where you belonged to a non-OPS registered Canadian pension plan, please obtain and submit a letter or the enclosed Supplementary Information Sheet from the former employer/previous plan administrator with the following required information:

- Name and address of former employer
- Name of the pension plan and its Canada Revenue Agency registration number
- Dates of plan membership (plan enrolment and termination)
Total credited service in years, months, and days - broken down for the following service periods:
 - a) up to December 31, 1986
 - b) from January 1, 1987 to December 31, 1991
 - c) from January 1, 1992 and after
- Dates of part-time employment, seasonal lay-off any unpaid leave of absence
- Pensionable/contributory earnings and pension adjustments for all service by calendar year for each year after December 31, 1989

4. Non-OPS registered Canadian pension plans (*continued*)

- Confirmation of the entitlement paid or amount, if any, of post-1989 contributions or benefits that were transferred to an RRSP or paid in cash (total payment amount required when paid from a previous RPP)
- Confirmation that any locked-in amounts are subject to Ontario's locking-in rules. For federally regulated plans, OPB will accept funds as long as the federally regulated plan/financial institution agrees to make the transfer without a locking-in agreement.

Credited service accrued prior to January 1, 1992

For any credited service accrued by the member before January 1, 1992, the former employer must provide confirmation that the funds are:

- Still in the previous employer's pension plan; and
- Available for transfer from the previous employer's pension plan to the PSPP

If you have a deferred pension with a non-OPS registered Canadian pension plan, you may have to transfer the pension benefit to purchase the pension credit. Rules vary by time period - see our booklet, *Understanding your pension credit*.

5. Deferred pension entitlement with the OPSEU Pension Trust

- If you are applying **within** 24 months of joining the PSPP we will send you the applicable transfer authorization form.
- If you are applying **after** 24 months of joining the PSPP please submit the information required under 4. *Non-OPS registered Canadian pension plan*.

The personal information on this form is collected under the authority of the *Public Service Pension Act* and will be used only to administer pension benefits. For more information or if you have any questions, contact Client Services or our Privacy Officer at: **Telephone** 416-364-5035 or **toll-free** 1-800-668-6203 (Canada & USA) / **Fax** 416-364-7578 / **www.opb.ca**



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Supplementary Information Sheet

Use for non-OPS registered Canadian Pension Plan only

OPB client number

Important to PSPP Member: Please have your former employer/ previous plan administrator complete this form. You must submit this form along with the "OPB1043 – Application to Purchase Pension Credit" form to OPB to provide supporting information for your non-OPS buyback application. You, as the PSPP member, must ensure that the information you provide is complete and accurate. Refer to page 2, section 4, on the "OPB1043 - Application to Purchase Pension Credit" form for details on the supporting information required by OPB to provide a buyback quote. If any of the required information is unavailable, please contact OPB.

Do not use this form for other types of buybacks.

IMPORTANT: if funds must remain in the former pension plan and are not available to transfer out, you are not eligible to buy back the former pension plan service.

SECTION 1 - OPB Member Information

OPB client last name (please print)

OPB client first name

Initials

SECTION 2 - Former Pension Plan Information

To be completed by the administrator of the former pension plan

Name and address of former employer

Name of Former Pension Plan

CRA Registration Number

Member Contributions ☐ Required ☐ Not Required

Plan Type ☐ Defined Benefit (DB) ☐ Defined Contribution (DC) ☐ Hybrid

Total accrued pensionable service:

Years

Months

Days

Date of hire (YYYYMMDD)

Plan Enrolment date (YYYYMMDD)

Plan Termination date (YYYYMMDD)

For Hybrid Plans only:

Please provide start and end dates of the defined benefit (DB) and defined contribution (DC) membership periods

DB Plan Enrolment date (YYYYMMDD)

DB Plan Termination date (YYYYMMDD)

DC Plan Enrolment date (YYYYMMDD)

DC Plan Termination date (YYYYMMDD)

SECTION 3 - Benefit Information

Is the benefit currently in the plan? ☐ Yes ☐ No

A. If yes, the benefit is currently in the plan, please complete the following information:

Confirmation that the funds are available for transfer to the Public Service Pension Plan ☐ Yes ☐ No

Estimated commuted value (DB) available for transfer

Commuted value calculation date (YYYYMMDD)

Current balance (DC) available for transfer

DC Balance as of date (YYYYMMDD)

B. If no, the benefit is no longer in the plan, please complete the following information:

IMPORTANT: Please list ALL benefit payment types issued and note each on separate lines.

Type of Benefit Paid (i.e., cash, locked-in, or non-locked in)	Amount Paid	Payment Method (i.e., cash, locked-in, or non-locked in)	Recipient Information (i.e., client, financial institution, client's former spouse, client's other RPP, etc.)	Date of Payment (YYYY/MM/DD)

SECTION 4 - Service History

[illegible]

Additional information may be provided on an additional page if necessary.

SECTION 5 – Non-Contributory Periods

Please provide information for non-contributory periods, if applicable:

Non-Contributory Period Type (part-time employment, temporary lay-off, unpaid leave of absence, etc.)	Start Date (YYYY/MM/DD)	End Date (YYYY/MM/DD)

SECTION 6 – Prior Plan Authorization

To be completed by former pension plan administrator or former employer:

Name and Title of Pension Plan Administrator (please print)

Contact telephone

Email

Signature

Date (YYYY/MM/DD)

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