

Please note important information on the reverse side of this form.

☐ I am registering for the first time

☐ I am changing my personal data

You must complete both sides of this form for your information to be updated. You can return your completed form to ATRF by mail, fax, email, or uploading it in MyPension.

## Member Information

(please print)

Note: Name changes require additional documents (details on reverse).

If you have not done so recently, please also complete the [Beneficiary Designation form](#).

Name Last

First

Initial

Previous Last Name (if applicable)

Social Insurance Number

Gender

☐ Female

☐ Male

Date of Birth

YYYY/MM/DD

Address Street

Telephone Home

City

Telephone Alternate

Province

Postal Code

Personal Email Address

## Adding a Pension Partner

**Pension Partner Information (see definition below)**

☐ Married

☐ Living Common-Law

To calculate your benefit entitlements, ATRF needs to know if you have a pension partner, and if so, their date of birth.

If you and your pension partner are both members of the teachers' pension plans, we require your pension partner's SIN and each of your signatures to authorize a change of address for both members.

Name Last

First

Initial

Gender

☐ Female

☐ Male

Date of Birth:

YYYY/MM/DD

Address Street

Telephone

City

Pension Partner's Personal Email Address

Province

Postal Code

Pension Partner's Social Insurance Number

Pension Partner's Signature

Date

YYYY/MM/DD

### Definition of Pension Partner:

- (i) a person who, at the relevant time, was married to that member and had not been living separate and apart from that member for 3 or more consecutive years, or
- (ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with that member in a conjugal relationship for a continuous period of at least 3 years and was, during that period, held out by that member in the community in which they lived as being in that conjugal relationship.

### Definition of Living Separate and Apart:

- Persons are living separate and apart
- (a) if they are living separate and apart and either of them has the intention to live separate and apart from the other, or
  - (b) if,
    - (i) they had been living separate and apart,
    - (ii) the separation was interrupted or ended by reason only that either of them became incapable of continuing to live separate and apart or of forming or having the intention to continue to live apart of that person's own volition, and
    - (iii) the separation would probably have continued if that person had not become so incapable.

## Removing a Pension Partner

**Note: Updating your pension partner information does not remove a pension partner's entitlement to a portion of your benefit entitlement under the plans.**

**Your pension partner will not be removed until all supporting documentation is received by ATRF.**

**Indicate the reason you are removing your pension partner. Please note, additional information may be required.**

- ☐ Death (Death Certificate required)
- ☐ Married, but living separate and apart (note: your pension partner will remain entitled to death benefits until you meet the definition of living separate and apart – see definition)
- ☐ Divorce (Divorce Certificate required)
- ☐ Common-law relationship has dissolved ([Participant Declaration that a Common-law Relationship has Dissolved](#) statutory declaration required)

Date of Event: \_\_\_\_\_  
YYYY/MM/DD

Former Pension Partner's Name    *Last*                      *First*                      *Initial*

## Your Signature

Signature \_\_\_\_\_ Date \_\_\_\_\_  
YYYY/MM/DD

## REQUIRED DOCUMENTS

When you apply for a benefit from ATRF, you must provide proof of your date of birth, which is needed to calculate your benefit. If you are applying for your pension, you must provide proof of your pension partner's date of birth (if applicable), which is used to calculate any Joint and Survivor pension options. When submitting this form, include a copy of one of the following documents to confirm your date of birth:

- birth certificate
- Canadian citizenship papers
- Certificate of Indian Status (status card)
- adoption papers
- Canadian passport (valid or expired)
- driver's license issued by a Canadian province or territory
- Alberta identification card
- Canadian registration of birth

## NAME CHANGE

To update your name, provide a copy of one of the following documents with this form:

- marriage certificate
- Divorce Judgement or Divorce Certificate showing the name you're returning to
- birth certificate (if you're returning to your birth name)
- Legal Change of Name Certificate from Vital Statistics

## ADDRESS CHANGE

Let your employer know if you change your address. Your employer sends your address to ATRF each month, and this may overwrite any changes you send directly to ATRF.

## PENSION PARTNERS AND BENEFICIARY(IES)

If you pass away before you retire, a benefit may be paid in this order to: 1. your pension partner 2. your dependent minor children (if you don't have a pension partner) 3. your named beneficiary(ies) (if you have no pension partner or dependent minor children) 4. your estate. Once your pension starts, you cannot change your nominee. To name or update your beneficiary(ies), complete the [ATRF Beneficiary Designation Form](#).

## IMPORTANCE OF PROVIDING CURRENT INFORMATION

The information you provide will be used by ATRF to calculate your benefit entitlements, send your annual plan member statement, newsletters, and other important updates.

## ANNUAL PLAN MEMBER STATEMENT

We prepare your Annual Plan Member Statement once your employer finishes reporting your pensionable service and salary and contributions to ATRF each school year. You can access your statement online anytime by logging in to ATRF's secure online portal, [MyPension](#) or by contacting ATRF directly.