



REQUEST FOR STATEMENT OF BENEFIT ENTITLEMENT

Division of pension regulations apply only to legal marriages. Please read the information on the back of this form before you complete it.

Member Information

Please use ink and print clearly

Social Insurance Number		
Name Last	First	Initial
Previous Last Name (if applicable)	Date of Birth	
	yyyy	mm dd
Address Street	City	Prov. Postal Code
Telephone Home	Telephone Work	
Telephone Cell		

Former Pension Partner Information

Legislation requires both parties receive a copy of the statement.

Check if your former pension partner is also a member of the Alberta Teachers' Retirement Fund.

Name Last	First	Initial
Previous Last Name (if applicable)	Date of Birth	
	yyyy	mm dd
Address Street	City	Prov. Postal Code
Telephone Home	Telephone Work	

Period of Joint Accrual

Start Date	yyyy	mm	dd	End Date	yyyy	mm	dd
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Member Signature

If you and your former pension partner are living at the same address, both signatures are required.

Signature	Date
	yyyy mm dd

Former Pension Partner Signature

Signature	Date
	yyyy mm dd

NOTE: In the event ATRF does not have information on file confirming your marriage, please provide a photocopy of the marriage certificate.

Alberta Teachers' Retirement Fund Board

600 Barnett House, 11010 142 Street NW, Edmonton AB T5N 2R1
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To divide pension entitlements, the Alberta Teachers' Retirement Fund Board (ATRF) requires a Matrimonial Property Order (MPO). Prior to retirement the pension division can only be a lump sum payment. For pensions that are already in pay, only the monthly payment can be divided; there is no option for a lump sum payment.

The Request for a Statement of Benefit Entitlement does not create any right to benefits. You are not obligated to divide the pension once you submit the request. The pension does not have to be divided. The value can be offset against other matrimonial property.

Additional Information Relating to the Request

- Either the member or former pension partner can request a Statement of Benefit Entitlement and a copy will be sent to both parties.
- ATRF is not required to provide a statement more than once in a calendar year.
- If both parties are plan members, both parties' entitlements will be valued.
- The percentage payable to the former pension partner in the MPO cannot exceed 50% of the member's pension benefit earned during the period of joint accrual.

Division Requirements

ATRF cannot process a division until:

- an MPO that complies with section 45 of the *Teachers' Pension Plans (Legislative Provisions) Regulation* (AR 204/95) has been filed with the ATRF,
- the divorce is final, and
- ATRF has received all required documentation; copy of the divorce certificate, certified copies of birth certificates or valid Canadian Passports, or marriage certificates, and if applicable, a Canada Revenue Agency Direct Transfer of a Single Amount form T2151.

Glossary

Member

For the purpose of the Statement of Benefit Entitlement the member is the person who has an entitlement in the Teachers' Pension Plan that is considered to be part of matrimonial property and subject to a possible division.

Former Pension Partner

For the purpose of the Statement of Benefit Entitlement the former pension partner is the person to whom the member was legally married.

Period of Joint Accrual

The period of joint accrual is the period that will be valued. The start and end dates of the period of joint accrual are often the date of marriage and the date of separation, but can be any dates that are mutually agreed upon by the parties involved. The actual division will be based on the period of joint accrual as stated in the MPO.