



REQUEST FOR STATEMENT OF BENEFIT ENTITLEMENT

Division of pension regulations only applies to legal marriages. All sections of this form must be completed. Please read the back of this form for more information. Return this form by fax to 780-452-3547 or email to member@atrf.com.

A copy of your marriage certificate must be included with your request.

Member Information

ATRF ID					
Name <i>Last</i>	<i>First</i>	<i>Initial</i>			
Previous Last Name (if applicable)	Date of Birth	<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd
yyyy	mm	dd			
Address <i>Street</i>	<i>City</i>	<i>Prov.</i> <i>Postal Code</i>			
Telephone <i>Primary</i>	Telephone <i>Alternate</i>				

Former Pension Partner Information

Legislation requires both parties receive a copy of the statement.

Name <i>Last</i>	<i>First</i>	<i>Initial</i>			
Previous Last Name (if applicable)	Date of Birth	<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd
yyyy	mm	dd			
Address <i>Street</i>	<i>City</i>	<i>Prov.</i> <i>Postal Code</i>			
Telephone <i>Primary</i>	Telephone <i>Alternate</i>				

Check if both parties are members of the Teachers' Pension Plan

Period of Joint Accrual

Start Date	End Date						
<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd	<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd
yyyy	mm	dd					
yyyy	mm	dd					

Signature

Both parties must sign this form if the member and former pension partner have the same mailing address.

Signature <i>Member</i>	Signature <i>Former Pension Partner</i>						
Date	Date						
<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd	<table border="0" style="width: 100%;"> <tr> <td style="width: 33%; text-align: center;">yyyy</td> <td style="width: 33%; text-align: center;">mm</td> <td style="width: 33%; text-align: center;">dd</td> </tr> </table>	yyyy	mm	dd
yyyy	mm	dd					
yyyy	mm	dd					

Alberta Teachers' Retirement Fund Board

600 Barnett House, 11010 142 Street NW, Edmonton AB T5N 2R1
Tel 780 451-4166 Fax 780 452-3547 Toll Free 800 661-9582 www.atrf.com



REQUEST FOR STATEMENT OF BENEFIT ENTITLEMENT

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. Until the matter is resolved, no benefits will be payable from the Plan.

The former pension partner's share is equal to the member's Total Entitlement, times the ratio of the pensionable service accumulated in the period of joint accrual to the total pensionable service earned up to the end date of the period of joint accrual, times the division factor. The division factor is the percentage of the pension to be awarded to the member's former pension partner in the Matrimonial Property Order (MPO) and cannot exceed 50%.

When a pension is not yet in pay, the former pension partner is entitled to a lump-sum payment. When a pension is already in pay, no lump-sum payment can be made to the former pension partner, only the monthly payment can be divided.

The MPO must include:

- The beginning and end of the period that the benefit is considered to have jointly accrued for the purposes of the *Matrimonial Property Act*,
- Whether or not there is a delayed division, if that option is available, and
- The "division factor", which is the percentage share of the jointly accrued benefit which is awarded to the member's former pension partner.

Additional Information Relating to the Request

- Either the member or former pension partner can request a Statement of Benefit Entitlement.
- Legislation requires both parties receive a copy of the statement.
- ATRF is not required to provide a statement more than once in a calendar year.
- If both parties are plan members, both parties' benefit entitlements will be valued.

Division Requirements

ATRF will process a division upon receipt of all of the following:

- A certified copy of a MPO that complies with section 45 of the *Teachers' Pension Plans (Legislative Provisions) Regulation* (AR 204/95) has been filed with the ATRF,
- A copy of the Divorce Certificate or statutory declarations signed by each party confirming that you have been living separate and apart for three or more consecutive years. The declarations must be prepared by ATRF and are available upon request, and
- A certified copy of the member's birth certificate, valid Canadian Passport, or Certificate of Canadian Citizenship. A certified copy of the marriage certificate is also required if the member's current name is different than the name on the birth certificate, valid Canadian Passport, or Certificate of Canadian Citizenship.

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.