

The 1974 Reciprocal Transfer Agreement, which is in effect between the Alberta Teachers' Retirement Fund Board (ATRF) and the British Columbia Pension Corporation, provides for a transfer of money at the time a member is being granted a pension.

PARTICIPATING AUTHORITIES

Teachers' Pension Plan

PO Box 9460

VICTORIA BC V8W 9V8

(250) 953-3022

1-800-665-6770 (Toll free in BC)

Alberta Teachers' Retirement Fund Board

600 Barnett House

11010 142 Street NW

EDMONTON AB T5N 2R1

(780) 451-4166

1-800-661-9582

ELIGIBILITY REQUIREMENTS

- You must have pensionable service with ATRF and the BC Teachers' Pension Plan (BCTPP) as of **January 31, 1995**.
- You must have ceased to occupy a position with the exporting pension plan and you must not be an active member of the exporting pension plan.
- You must not be in receipt of a pension from either the importing or exporting pension plan.
- You must be applying to receive your pension from the importing pension plan.

WHEN ATRF IS THE IMPORTING PENSION PLAN

- You must have at least five years of Pensionable Service with ATRF.
- Your combined Pensionable Service with ATRF and the BCTPP must meet ATRF's minimum service requirements for pension eligibility.
- You must have at least one year of Pensionable Service with ATRF after the last year of Pensionable Service being transferred from the BCTPP.

PROCESS & DETAILS ABOUT THE TRANSFER

- You must send a completed 1974 Reciprocal Transfer Agreement Application form to both the importing and exporting pension plans.
- The money transferred from the exporting pension plan represents twice your contributions in the exporting plan, plus interest, or, if you are eligible for a pension from the exporting plan, the value of your pension.
- In a transfer to ATRF, the years of service under the exporting pension plan are used to determine your eligibility for pension, and are also used in the pension calculation.
- ATRF determines its transfer requirements by calculating the pension and determining the value for each year of service being transferred.
- If the amount available for transfer by the exporting pension plan is less than the amount requested by the importing pension plan, the importing pension plan will credit you with a portion of the service. You will have the opportunity to purchase any shortfall in service. If you decide not to pay the difference, your pensionable service will be reduced proportionately.

ONCE THE TRANSFER HAS BEEN COMPLETED

- The service is no longer to your credit with the exporting pension plan, and no benefit is payable.
- The benefit available to you from the importing pension plan will be paid according to its provisions.



1974 BC RECIPROCAL TRANSFER AGREEMENT APPLICATION

Table with 3 columns: NAME, ADDRESS, and Date of Birth. Includes fields for Previous Name, Social Insurance Number, Home Telephone Number, and Work Telephone Number.

POSTAL CODE

EXPORTING PLAN

IMPORTING PLAN

PERIOD TO BE TRANSFERRED FROM (mo/yr) / TO (mo/yr) /

PRESENT EMPLOYER

DATE OF EMPLOYMENT WITH PRESENT EMPLOYER

PLEASE LIST YOUR SERVICE BY SCHOOL YEAR WITH THE EXPORTING PENSION PLAN:

Table with 2 columns: DATES OF SERVICE and EMPLOYER NAMES. Multiple rows for listing service history.

Is there a Family Property Order between you and your spouse dividing your benefits under the Exporting Plan? (If you have never been legally married, this section does not apply to you so you should check not applicable)

YES NO Not applicable

I hereby apply to participate under the 1974 BC Reciprocal Transfer Agreement between the British Columbia Pension Corporation and the Alberta Teachers' Retirement Fund Board. All personal information will be handled in a confidential manner in accordance with the legislation.

DATE APPLICANT SIGNATURE

A signed copy of this Application must be returned to both the Importing and Exporting Pension Plan Authorities.

Personal information on this form is collected under the authority of section 25 of the Alberta Teachers' Pension Plans Act and sections 33(a) and 33(c) of the Alberta Freedom of Information and Protection of Privacy Act for the purpose of administering benefits under the Teachers' and Private School Teachers' Pension Plans.



1974 BC RECIPROCAL TRANSFER AGREEMENT APPLICATION

Form with fields: NAME, Previous Name (if different), Date of Birth (YYYY/MM/DD), ADDRESS, Social Insurance Number or Member Identification No., MALE/FEMALE checkboxes, Home Telephone Number, Work Telephone Number, Area Codes.

POSTAL CODE

EXPORTING PLAN _____

IMPORTING PLAN _____

PERIOD TO BE TRANSFERRED FROM (mo/yr) _____ / _____ TO (mo/yr) _____ / _____

PRESENT EMPLOYER _____

DATE OF EMPLOYMENT WITH PRESENT EMPLOYER _____, _____

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