

REQUEST FOR STATEMENT OF BENEFIT ENTITLEMENT

Division of pension regulations applies to legal marriages and common-law relationships of more than three years. All sections of this form must be completed. Please read the back of this form for more information.

Member Information

<p>_____</p> <p>ATRF ID</p> <p>_____</p> <p>Name <i>Last</i></p> <p>_____</p> <p>Previous Last Name (if applicable)</p> <p>_____</p> <p>Address <i>Street</i></p> <p>_____</p> <p>Telephone <i>Primary</i></p>	<p>_____</p> <p><i>First</i></p> <p>_____</p> <p><i>Initial</i></p> <p>Date of Birth</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p> <p>_____</p> <p><i>City</i></p> <p style="text-align: center;"><i>Prov. Postal Code</i></p> <p>_____</p> <p>Telephone <i>Alternate</i></p>
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Former Pension Partner Information

Legislation requires both parties receive a copy of the statement.

<p>_____</p> <p>Name <i>Last</i></p> <p>_____</p> <p>Previous Last Name (if applicable)</p> <p>_____</p> <p>Address <i>Street</i></p> <p>_____</p> <p>Telephone <i>Primary</i></p>	<p>_____</p> <p><i>First</i></p> <p>_____</p> <p><i>Initial</i></p> <p>Date of Birth</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p> <p>_____</p> <p><i>City</i></p> <p style="text-align: center;"><i>Prov. Postal Code</i></p> <p>_____</p> <p>Telephone <i>Alternate</i></p>
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Check if both parties are members of the Teachers' Pension Plan

Period of Joint Accrual

<p>Start Date</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p>	<p>End Date</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p>
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Signature

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

<p>_____</p> <p>Signature <i>Member</i></p> <p>_____</p> <p>Date</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p>	<p>_____</p> <p>Signature <i>Former Pension Partner</i></p> <p>_____</p> <p>Date</p> <p>_____</p> <p style="text-align: center;"><i>yyyy mm dd</i></p>
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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. If you have any questions regarding the collection of this information, contact ATRF at 1-800-661-9582 or by mail at 500 Barnett House, 11010 142 Street NW, Edmonton, AB, T5N 2R1.

Alberta Teachers' Retirement Fund

500 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

To divide pension entitlements, the Alberta Teachers' Retirement Fund Board (ATRF) requires a court-filed and court-certified Family Property Order (FPO). 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 family property. Until ATRF receives a valid FPO or confirmation that a member's benefit entitlement will not be divided, no benefits will be payable from the Plans.

The former pension partner's share is equal to the member's total entitlement in the Plans multiplied by 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 multiplied by the division factor. The division factor is the percentage of the pension to be awarded to the member's former pension partner in the Family Property Order (FPO) and cannot exceed 50%.

The FPO must include:

- The beginning and end of the period that the benefit is considered to have jointly accrued for the purposes of the *Family 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 cannot process a division until:

- A court-filed and court-certified copy of an FPO that complies with section 45 of the *Teachers' Pension Plans (Legislative Provisions) Regulation* has been filed with the ATRF,
- ATRF has received all required documentation; copies of birth and relationship 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 the family 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 or with whom the member was in a common-law relationship for at least three years.

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 or the date the common-law relationship commenced 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 FPO.