

# SPOUSAL / PENSION PARTNER STATUS DECLARATION

Before completing this Declaration, please read the sections “Spousal / Pension Partner Status Declaration” and “Definitions” on the reverse of this form.

I, \_\_\_\_\_

Social Insurance Number \_\_\_\_\_, the plan member, solemnly declare:

That I have read the definition of a pension partner provided on the back of this form,

I DO

That: \_\_\_\_\_ have a pension partner, as defined, on the date that I completed this declaration,

I DO NOT

That should my pension partner status change on or before pension commencement, I will inform ATRF and complete a new Spousal / Pension Partner Status Declaration.

## PENSION PARTNER'S INFORMATION

Name of Pension Partner \_\_\_\_\_

Date of Birth of Pension Partner \_\_\_\_\_

My Pension Partner Status is:  LEGAL MARRIAGE  COMMON LAW (includes same gender)

DECLARED before me:

at \_\_\_\_\_  
(Name of Municipality)

in \_\_\_\_\_  
(Province/State/Territory and Country, if not Canada)

this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

And I make this solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath.

\_\_\_\_\_  
(Signature of Plan Member)

\_\_\_\_\_  
A Commissioner for Oaths / Notary Public

(PRINT OR STAMP NAME BELOW)

MY APPOINTMENT EXPIRES \_\_\_\_\_, \_\_\_\_\_

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**

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## **SPOUSAL / PENSION PARTNER STATUS DECLARATION**

- This form should be used in the event you are applying for an immediate pension.
- If you are retiring, the declaration cannot be signed more than four months prior to your pension commencement date.
- The form must be declared before a Commission for Oaths (Commissioners are available in the ATRF office).
- Please read the definitions below before you complete the declaration.

## **DEFINITIONS**

The following definitions are provided in the *Teachers' and Private School Teachers' Pension Plans* (the plan rules):

**“Pension Partner”** (section 1(1)(hh.1) of the plan rules)

“pension partner” in relation to a member, means

- (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;

**“Living separate and apart”** (section 1(3) of the plan rules)

[...] 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.