

1974 RECIPROCAL TRANSFER AGREEMENT

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

PARTICIPATING AUTHORITIES

Alberta Teachers' Retirement Fund

500 Barnett House
11010 142 Street NW
EDMONTON AB T5N 2R1
(780) 451-4166
1-800-661-9582

Manitoba Teachers' Retirement Allowances Fund Board

Johnston Terminal
330 - 25 Forks Market Road
WINNIPEG MB R3C 4S8
(204) 949-0048
1-800-782-0714

Ontario Teachers' Pension Plan Board

5650 Yonge Street
TORONTO ON M2M 4H5
(416) 226-2700
1-800-668-0105

Saskatchewan Teachers' Superannuation Commission

RM 129, 3085 Albert Street
REGINA SK S4S 0B1
(306) 787-6440
1-877-364-8202

Commission administrative des regimes de retraite et d'assurances

475 Rue Saint-Amable
QUEBEC QC G1R 5X3
(418) 644-3092
1-800-463-5533

ELIGIBILITY REQUIREMENTS

- You must have pensionable service with ATRF and with one of the above listed participating pension plan authorities.
- You must have begun employment with the importing pension plan on or before **January 30, 1978**.
- 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 pension from the importing 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 participating pension plan authority 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 participating pension plan authority.

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.

NAME	Previous Name (if different)	Date of Birth (YYYY/MM/DD)
ADDRESS	Social Insurance Number or Member Identification No.	<input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
	Home Telephone Number () _____ Area Code	Work Telephone Number () _____ Area Code

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:

DATES OF SERVICE

EMPLOYER NAMES

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

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 Reciprocal Transfer Agreement. 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.

The personal information collected through this form is for the purpose of administering benefits under the Teachers' and Independent School Teachers' Pension Plans and will be input into an automated system which generates content. This collection is authorized by sections 4(a) and 4(c) of the *Protection of Privacy Act* and section 25 of the *Teachers' Pension Plans Act*. For questions about the collection of personal information, contact legal@atrf.com or 1-800-661-9582 or by mail to 500 Barnett House, 11010 142 Street NW, Edmonton, AB, T5N 2R1.

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