

The 1974 Reciprocal Transfer Agreement, which is in effect between the Alberta Teachers' Retirement Fund (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

500 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

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 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.

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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