

## Application for Pension Benefits

<b>IMPORTANT - See reverse for information before completing this form.</b>			
Pension Plan Name (Local Union)			
Last Name	First Name	Certificate/Union ID Number	
Address	City/Town	Province	Postal Code
Home Phone Number		Cell Phone Number	
Email Address			
Date of Birth <sup>1</sup> <small>MM/DD/YYYY</small>	Marital Status <sup>2</sup> <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Union <input type="checkbox"/> Common-law <input type="checkbox"/> Separated/Divorced <input type="checkbox"/> Widowed		
Spouse's Last Name	Spouse's First Name	Spouse's Date of Birth <sup>1</sup> <small>MM/DD/YYYY</small>	
Benefit Type Requested: <input type="checkbox"/> Retirement (monthly pension) <input type="checkbox"/> Termination (lump sum withdrawal)	Do you want an estimate or final option package? <input type="checkbox"/> Estimate <input type="checkbox"/> Final Benefit Package <b>IMPORTANT: Do not apply for final option package unless you have or are planning to stop working.</b>		
Retirement/Termination Date	Last Employer Name (if known)	Date Last Worked <small>MM/DD/YYYY</small>	
<p>I hereby certify that the above statements are true, accurate, and complete to the best of my knowledge and belief. I understand that Manion Wilkins &amp; Associates Ltd. will use the information provided by me on this application form to administer my benefit entitlements. I hereby authorize the information on this form to be released to my Union, Employer, and the Board of Trustees of this pension trust fund for the purpose of approving and verifying payment of pension benefits. A digital image of this release shall be deemed to be as valid as the original.</p>			
X _____		<small>MM/DD/YYYY</small> _____	
Member's Signature <sup>3</sup>		Date	

**1. Proof of Age**

We require proof of age (e.g. Driver's License, Birth Certificates issued by government authority, Citizenship papers, Government Passport.) before any benefit can be processed. If you are married and applying for a retirement benefit, we also require your Spouse's Proof of Age.

**2. Proof of Marital Status**

If you are married, we require a copy of your marriage certificate. If you are in a common-law relationship, we will send you a form you will need to complete. If you are separated or divorced, and your Separation Agreement has provisions related to the division of your pension entitlement, you are required to file a copy with us.

**3. Signature**

If you are unable to print and sign this form, we will accept a form completed with your full name typed into the signature field and submitted to us electronically via the e-mail address we have on file for you.

**You can send your application to us in the following ways or through your local union office.**



You can submit your completed application by fax to  
**416.234.2071**



You can submit your completed application by secure e-mail to  
**askpension@manionwilkins.com**



You can submit your completed application by mail to:  
**Manion Wilkins & Associates  
500 – 21 Four Seasons Place  
Toronto, ON M9B 0A5**

## IMPORTANT INFORMATION

Please print the application and complete it in full before you submit it for processing. Incomplete information will result in a delay in processing your request. You can submit the form to us by fax, secure e-mail, or mail. If there are any questions about completing this application, please contact us at (416) 234-5044 or 1(800) 263-5621.

Completed applications can be submitted to us directly, or to your union local. If you submit the application to us directly, we will contact your union local to confirm your union history before processing your application

The Retirement/Termination Date you select should be at a point in time you expect to have stopped working, and normally is reported as the first day of the month – please ensure the date you select is at minimum the first day of the following month of the date you submit your application.

If you are applying for retirement benefits:

- It is important to note that your pension may be impacted if you elect to return to work in a covered position. To understand the impact of returning to work, please reach out to your local union office.
- If you are married at the time you retire, you are required by law to elect a joint & survivor pension. If your spouse is waiving their entitlement to a survivor pension, a Provincial Spousal Waiver form and a Certificate of Independent Legal Advice on Waiver of Joint and Survivor Pension form must be filed with Manion before we can process an election for any other form of pension benefit. We will send you these forms, with your Retirement Benefit Statement.

If you are applying for termination benefits:

- It is important to understand the impact a termination benefit may have on your continued membership in the union, and any other benefits you are entitled to as a member of the union. To understand the impact of electing to receive a termination benefit, please reach out to your local union office.

Once we receive your completed application, and your local union has provided us information about your union history, we will process your application within 30 days of receipt of all information. Any missing, incomplete, or unsubmitted information required to process your application may result in additional delays. We will keep you informed about the processing of your application via e-mail. We will send you a message when we have started processing your application and again once we have completed processing your application.

The information about your entitlement from the pension plan prepared for you once your application and union history is provided to us, is based on the information we have on file, the provisions of the Pension Plan and current legislation that governs your Pension Plan. Your benefit entitlement will be based on the official plan provisions of your pension plan. The information provided will not guarantee you any right to receive a benefit or the amount of the benefit if the terms of the plan do not entitle you to that benefit. A change in any of the information on file could result in a difference in the actual benefit you receive from the plan. In the event of an error or omission in the information on the resulting statement provided to you, please contact our office immediately. Any incorrect information will be corrected upon verification.

The Trustees of your pension plan, Manion, and all service professionals retained by the Trustees are committed to protecting the privacy of your personal information. The information required to administer your benefits is kept in our offices. Your personal information is used in accordance with the privacy policy of your Pension Plan and shared only to the extent required by law with your plan sponsor, your local union and the institutions caring for your benefits

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Toronto, ON M9B 0A5**