



McMaster University
Human Resources Services

Pension Estimate Request Form

In order to make an informed decision regarding your retirement, McMaster provides you with various tools.

1. An annual pension statement as at June 30 each year - This statement provides you with the relevant information about your pension entitlement, including your accumulated pension earned to date.
2. A new pension portal for Salaried Pension Plan 2000 members – This web modeler also allows you the flexibility to prepare your own pension estimates.

Only those who do not have access to the pension portal should complete this form. If you have further questions on how to access the pension portal or run your own estimates, please contact HR.

Upon your termination or retirement from McMaster, you may elect to receive the lump sum value (the “commuted value”) of the pension you have earned during your period of employment. The commuted value of your McMaster pension is the estimated amount of money you would have to put aside today, to grow with tax-sheltered investment earnings, to provide you with a future benefit similar to the McMaster pension you've earned. The commuted value is determined based on future interest and mortality rates effective on your date of termination. These factors change over time and have significant impacts on the commuted value. McMaster does not provide commuted value estimates prior to termination from the University.

Please PRINT clearly and return the completed and signed form to Human Resources Services at the address indicated below.

Part I - To be completed by Employee

Employee Name: _____ McMaster ID: _____

E-mail Address: _____ Extension: _____

Indicate the Preferred Method of Pension Estimate Delivery:

- Mail to Home Address
 Inter-office _____
 E-mail

Proposed Retirement Date For Your Pension Estimate Calculation	For HRS Use Only			
	Retirement Category	Completed by	Approved by	Sent by
1				
Please note estimates are manually produced and therefore requests are processed where possible within 4 to 6 weeks.		Date:		

Signature of the Employee

Date

Part II - To be completed by Human Resources Services

Date Request Received:

Proposed Date of Completion:

Date Sent to Employee:

Date Completed:

Administrator Initials:

NOTES:

Contact Information:

Human Resources Services, CSB Room 202

1280 Main St. West, Hamilton, ON L8S 4L8

Phone (905) 525-9140

Email: pension@mcmaster.ca

<https://hr.mcmaster.ca>
