

Request For a Pension Transfer from Other Employer Plans

Note: McMaster University can accept transferred- in funds from any Canadian pension plan; however, the transferred-in monies will be administered in accordance with **Ontario pension legislation**.

Employee Name: _____

McMaster ID: _____

Email Address: _____

Extension: _____

Please Note:

1. Under Section 8.01(a) of the Contributory Pension Plan for Salaried Employees of McMaster University including McMaster Divinity College 2000 text, a Member, who prior to entering the service of the University was an active participant in a previous employer's registered pension plan, may transfer to the Fund monies payable from such previous registered pension plan, subject to the consent of the University.

2. Under Section 8.01(b) of the Contributory Pension Plan for Salaried Employees of McMaster University including McMaster Divinity College 2000 text, as a result of the transfer to the Plan under Section 8.01(a) and subject to the certification of any past service adjustment (as defined under the Income Tax Act), the University shall grant to the Member the amount of Pensionable Service which can be produced by the transferred amount, based on the recommendation of the Actuary."

Employee Date of Birth: _____

Gender: Male Female

Spouse's Date of Birth: _____

Gender: Male Female

Name of Former Pension Plan: _____

Service in Former Pension Plan: _____

Value of Locked-in Pension (Lump-Sum): _____

Date of Locked-in Pension Calculation: _____

Termination Date from Prior Employer: _____

Former Plan's Contact Information: Name: _____

Address: _____ Phone: _____

Note: Please note that all the above information is required and must be provided in advance in order to proceed with the transfer request. A copy of the termination package from the former pension plan verifying the above information should accompany this application. Unfortunately, incomplete applications cannot be processed.

Signature of the Employee _____

Date _____

The information provided above will be forwarded to McMaster's actuaries to complete the calculation. As transfers are complex in nature and involve the current and prior administrator, please note that processing can take 4-6 months approximately.

The information gathered on this form is collected under the authority of the McMaster University Act, 1976. The information is used for the academic, administrative, employment-related, financial and/or statistical purposes of the University including, but not limited to, admissions; registration and maintaining records; awards and scholarships; convocation; provision of student services, including access to information systems; alumni relations; and disclosure to or on behalf of the applicable McMaster student government. This information is protected and is being collected pursuant to section 39(2) and section 42 of the Freedom of Information and Protection of Privacy Act of Ontario (RSO 1990). Questions regarding the collection or use of this personal information should be directed to the University Secretary, Gilmour Hall, Room 210, McMaster University.