

Transfer of Past Service from a Previous Pension Plan

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**.

1. Member Information

First Name: _____ **Last Name:** _____
SIN: _____ **Email:** _____

2. Former Pension Plan History

Name of former Employer / Registered Pension Plan and Plan Number

Value of Locked-in Pension (Lump-Sum): _____ **Effective Date of Locked-in Pension Value (dd/mm/yyyy):** _____
Pension Enrollment Date (dd/mm/yyyy): _____ **Pension Termination Date (dd/mm/yyyy):** _____

Year		Pensionable Service (years)	Pension Adjustment	Employment Status (FT/PT)
Start Date (dd/mm/yyyy)	End Date (dd/mm/yyyy)			

Service Subtotal:	
*Purchased Service:	
Service Total:	

**Purchased Service includes the purchase of past pensionable service within the former pension plan as well as any service transferred from a previous employer's registered pension plan.*

Leave Dates (if applicable)	
Start Date (dd/mm/yyyy)	End Date (dd/mm/yyyy)

Year		Annualized Contributory Earnings**
Start Date (dd/mm/yyyy)	End Date (dd/mm/yyyy)	

****Annualized earnings refers to the full-time equivalent earnings (not always equal to actual earnings). For example, a member earning \$30/hour, full-time hours of 35/week = \$30 x 35 x 52 weeks = \$58,500 annualized contributory earnings.**

Name and Title of Pension Plan Administrator (please print): _____

Telephone Number: _____

Email: _____

Plan Administrator's Signature: _____ **Date (dd/mm/yyyy):** _____

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please forward the completed form to pension@mcmaster.ca