



Retirement Application Form

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The Management Employees Pension Plan (MEPP) encourages submitting your application online using the retirement application tool in Your Pension Profile. Alternatively, use this form to apply to begin receiving your MEPP pension.

To avoid delays, submit this completed form **90 days before you would like your pension to commence** (retirement date). If you have combined pensionable service (CPS), you will also need to complete an application for the related plan in order to start that pension. If you are applying for a disability pension, contact your employer or visit mepp.ca to obtain a *Disability Retirement Benefits Application Form*.

Please complete the information on this form and send it to:

MEPP, 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9 Fax: 780-421-1652

1. Member Information

member's first name

member's middle name

member's last name

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member's social insurance number

member's address

member's address effective date (YYYY/MM/DD)

city, town, village, etc.

province

postal code

country (if outside Canada)

primary phone number
Work Home Cell

ext.

country code
(if outside
Canada/USA)

secondary phone number
Work Home Cell

Definition of Pension Partner

"Pension partner" means

- (i) a person who, at the relevant time, was married to a participant or former participant and had not been living separate and apart from him or her for 3 or more consecutive years, or
- (ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with the participant or former participant in a conjugal relationship
 - (A) for a continuous period of at least 3 years, or
 - (B) of some permanence, if there is a child of the relationship by birth or adoption;

Persons are living separate and apart

- (a) if they are living apart and either of them has the intention to live separate and apart from the other, or
- (b) if, before the relevant time,
 - (i) they had been living separate and apart for any period, and
 - (ii) that period was interrupted or terminated by reason only that either of them became incapable of continuing to live separate and apart or of forming or having the intention to continue to live separate and apart of that person's own volition,

and the separation would probably have continued if that person had not become so incapable.

If you are not certain how the definition of pension partner applies to you, please contact the Member Services Centre at 1-877-889-MEPP (6377).

2. According to the definition above, I have a pension partner on the date that I am completing this form (please check one):

YES → If YES, please complete section 3. *Pension Partner Information*.

NO → If NO, please skip to section 4. *Buyback Service in Pay*.

Personal information on this form is collected under the authority of section 9.2 of the *Alberta Public Sector Pension Plans Act* and section 33 of the *Alberta Freedom of Information and Protection of Privacy Act* for pension administration purposes. If you have any questions regarding the collection of this information, contact the Member Services Centre at 1-877-889-MEPP (6377), or write to: 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9.

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3. Pension Partner Information

pension partner's first name

pension partner's middle name

pension partner's last name

pension partner's date of birth (YYYY/MM/DD)

marital status (married/common law)

Please check one:
female male

4. Buyback Service in Pay

If you are currently paying for prior service, do you plan to complete your buyback payments?

Yes, I will complete my payments.

No, I will not complete my payments. Please prorate my service.

N/A

If you are currently paying for buyback service, you must complete payment in full within 90 days of your termination date or you will only receive a partial credit of buyback service based on what you paid.

5. Pension Commencement Date

I want my pension to start on

date (YYYY/MM/DD)

If the date you give is before you stop participating in the Plan, or before MEPP receives your application, your pension commencement date will be adjusted to the closest possible date allowed under the rules of the Plan. We will send you a *Retirement Benefit Statement* with your pension options. This statement will show the pension commencement date used to calculate those options.

6. Member Authorization

The information on this form is, to the best of my knowledge and belief, complete and accurate.

member's signature

member's name (please print)

This is an official record that must be signed to be valid.

Mailing and fax information is at the top of page 1. Keep a copy of the completed form for your records. If you have questions, please contact the Member Services Centre, toll free at 1-877-889-MEPP (6377).

If you are participating in MEPP, your employer must complete the following section. If you are no longer participating in MEPP, completion of this section by your former employer is not required.

7. Employer Use Only

employer name

employer number

member's termination date (YYYY/MM/DD)
(last day member participated in the Plan)

name of authorized person
(please print)

phone number

ext.

signature of authorized person

date (YYYY/MM/DD)