



## Disability Retirement Benefits Application Form

Use this form to apply for a MEPP disability pension. Two types of disability pensions are available. A partial disability pension may be granted when medical evidence indicates that a member is no longer capable of performing the regular duties of his or her job. A total disability pension may be granted when medical evidence indicates that the member is permanently unable to engage in any form of gainful employment. The disability assessment will be based on a combination of medical evidence and pension legislation.

Please send this completed form and the Confidential Medical Statement (after completion by your physician(s)) to:  
MEPP, c/o Alberta Pensions Services Corporation (APS), 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9. Fax: 780-421-1652

### 1. Member Information

member first name		member middle name		member last name	
<hr/>					
member social insurance number					
<hr/>					
member address			member address effective date (YYYY/MM/DD)		
<hr/>					
city, town, village, etc.		province		postal code	
<hr/>					
country (if outside Canada)		phone number Work <input type="checkbox"/> Home <input type="checkbox"/> Cell <input type="checkbox"/>		ext.	country code (if outside Canada/USA)
<hr/>					

**You are only eligible for a disability pension if you commenced contributions to MEPP, or have combined pensionable service from MEPP, on or before June 30, 2007**

### 2. Have you applied for or are you presently receiving

	applied for		receiving	
Long-term disability benefits?	<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no
Workers' Compensation Board (WCB) benefits?	<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no
Canada Pension Plan (CPP) disability benefits?	<input type="checkbox"/> yes	<input type="checkbox"/> no	<input type="checkbox"/> yes	<input type="checkbox"/> no

### 3. 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).

**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 4. *Pension Partner Information*
- NO** → If NO, please skip to section 5. *Buyback Service in Pay*



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## 4. 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

## 5. Buyback Service in Pay

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

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

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.

## 6. 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 commencement will be adjusted to the closest possible date. We will send you a **Retirement Benefit Statement** with your pension options. This statement will show the commencement date used to calculate those options.

## 7. Member Authorization

The information on this form is, to the best of my knowledge and belief, complete and accurate. I authorize my physician(s) to release to MEPP, its representative(s) and/or consulting physician(s), any information relating to the medical condition(s) which is the cause of my disability. This information is to be used to evaluate my application for a disability pension only and permission is **NOT** granted for any other use or disclosure.

\_\_\_\_\_ member's signature

\_\_\_\_\_ member's name (please print)

**Please note:**

- You are responsible for the payment of obtaining any information relating to your medical condition.
- 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).



Disability Retirement  
Benefits Application  
Form

The following section must be completed by your employer unless you are applying for a deferred retirement (meaning you previously left your funds with MEPP).

**8. Employer Use Only**

a) Please explain whether the member is incapable of performing the duties of his or her position.

\_\_\_\_\_  
\_\_\_\_\_

b) Is the member receiving WCB benefits?       yes       no

If yes, select one:

- temporary total disability  
 temporary partial disability

c) Is the member receiving long-term disability (LTD) benefits?

\_\_\_\_\_

d) If there was a leave of absence this year, record the *estimated* service and salary for the leave period.

Service \_\_\_\_\_      Salary \_\_\_\_\_

**9. Employer Certification**

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

\_\_\_\_\_  
employer name

\_\_\_\_\_  
employer  
number

\_\_\_\_\_  
member's termination date  
(YYYY/MM/DD)

\_\_\_\_\_  
name of authorized person  
(please print)

\_\_\_\_\_  
phone number

\_\_\_\_\_  
ext.

\_\_\_\_\_  
signature of authorized person

\_\_\_\_\_  
(YYYY/MM/DD)