



Transfers under the Federal Transfer Agreement (Public Service Superannuation Pension Plan)

As an active member of the Management Employees Pension Plan (MEPP) with benefit entitlements in the federal Public Service Superannuation Pension Plan (PSSPP), you may be eligible to transfer your former pension plan service into MEPP through a reciprocal transfer.

Would you be eligible?

You may be eligible to transfer if you:

- have terminated from the PSSPP employer
- are ineligible for an unreduced benefit from PSSPP
- have left your funds with PSSPP
- apply for transfer within one year of your commencement with MEPP

Why transfer your service?

There are two main advantages to transferring your former service into MEPP

- you may be able to retire at an earlier date
- your monthly pension at retirement may be higher

How does a transfer work?

Each pension plan has its own benefit formula and contribution rates. When you transfer service to a new pension plan, the importing plan calculates the value of that service according to its own benefit provisions.

In your case, MEPP will calculate the cost of crediting all your service from PSSPP. That cost is compared to the value of your benefit under PSSPP. If the amount required by MEPP is less than or equal to the amount available from PSSPP, you will receive full credit for the transferred service. If the amount required by MEPP is greater than the amount available from PSSPP, a transfer shortfall will exist.

If you have a shortfall

You are not required to purchase the transfer shortfall; however, you will not receive credit for the shortfall service under MEPP until it is purchased. If you decide not to purchase the shortfall service at the time of the original transfer, you may purchase this service at a later date; however the cost may be much higher. If you remove your funds from MEPP at a later date, the payments you made on the shortfall will be refunded plus interest.

Income tax and your pension

Federal income tax regulations limit the amount of money you may contribute to tax-deferred retirement savings tools, including contributions to defined benefit pension plans and Registered Retirement Savings Plans (RRSP.)

When you transfer your service from one pension plan to another through a reciprocal transfer or a termination payout and optional service purchase, it may affect your RRSP contribution room.

Applying for a transfer

To apply for a transfer between PSSPP and MEPP, please print the attached Appendix A2 – Transfer Request for Transfer Estimate form and return the completed and signed copy to:

MEPP c/o Alberta Pensions Services Corporation (APS)
5103 Windermere Blvd SW
Edmonton, AB T6W 0S9

Public Works and Government Services Canada
Government of Canada Pension Centre Mail Facility
150 Dion Blvd
PO Box 8000 Matane, QC G4W 4T6
ATT: Pension Transfer Services Section

APPENDIX A2 – REQUEST FOR TRANSFER ESTIMATE

Transfer from the Government of Canada to the Province of Alberta [Management Employees Pension Plan/Supplementary Retirement Plan for Public Service Managers]
[Public Service Pension Plan] [Local Authorities Pension Plan]

PART I: EMPLOYEE INFORMATION – PROVINCE OF ALBERTA *(To be completed by the Employee)*

Member First Name			Member Last Name			Social Insurance Number		
Member Previous Last Name, if different from above			Date of Birth Y Y Y Y Y Y Y Y			Gender (M/F)	Former Pension Plan ID No	
Home Address						Address Effective Date Y Y Y Y M M D D		
						Member Email Address		
City						Province		Postal Code
Home Telephone Number			Work Telephone Number					
Area Code	Telephone Number		Ext	Area Code	Telephone Number		Ext	
Name of Former Employer								
Is there a Matrimonial Property Order that affects your federal pension?						Check <input checked="" type="checkbox"/> One <input type="checkbox"/> Yes <input type="checkbox"/> No		
Period of pensionable service to be transferred:								
From (Date)			To (Date)					
Y	Y	Y	Y	M	M	D	D	
Y	Y	Y	Y	M	M	D	D	

PART II: EMPLOYEE'S AUTHORIZATION *(To be completed by the Employee)*

I hereby authorize the President of the Treasury Board to release the information necessary to produce a transfer estimate, including my social insurance number.

I understand that completion of this document does not constitute a request for transfer. I am aware that, to become eligible for a transfer of funds under the terms of the pension transfer agreement, I must complete form **APPENDIX B2 (Request for Transfer of Service Credits)** while employed and an active contributor under the PLAN identified above and within the time limits set out in the pension transfer agreement.

The personal information provided will be treated as confidential and will be disclosed only to those persons authorized to deal with my request in accordance with the applicable provincial and federal legislation.

MEMBER SIGNATURE	DATE SIGNED (YYYY/MM/DD)

Member — A duly signed copy of this Appendix A2 must be returned to each of the following addresses:

Public Works and Government Services Canada
Government of Canada Pension Centre Mail Facility
150 Dion Boulevard
PO Box 8000 Matane, QC G4W 4T6
ATT: Pension Transfer Services Section

Alberta Pensions Services Corporation
5103 Windermere Boulevard SW
Edmonton, AB T6W 0S9

PART III: PENSION PLAN INFORMATION *(To be completed by Alberta Pensions Services Corporation)*

Name of Present Employer			Date of Employment with Present Employer			Current Pension Plan ID NO.		
Date of Receipt (Appendix A1):								
Y	Y	Y	Y	M	M	D	D	

Completed by: _____
(PRINT NAME AND TITLE)

SIGNATURE	DATE SIGNED (YYYY/MM/DD)