

Office Use Only

APPLICATION FOR MONTHLY PENSION BENEFIT

Freedom of Information and Protection of Privacy Act Personal information on this form is collected under clause 31(c) of the *Freedom of Information and Protection of Privacy Act* R.S.P.E.I. 1988, Cap. F-15.01 as it relates directly to and is necessary for the administration of the pension plan and will be used for that purpose. Under certain circumstances (e.g., valuing pension benefits) some information may be released subject to the provisions of the *Freedom of Information and Protection of Privacy Act*. If you have any questions about this collection of personal information, you may contact the Manager of Pension & Benefits at 902-368-4200.

Complete Sections 1 through 7 and sign at the bottom of Page 2

Section 1 – Member Information (PLEASE PRINT CLEARLY)

LAST NAME		FIRST NAME & INITIAL(S)	
GENDER	SOCIAL INSURANCE NUMBER:	DATE OF BIRTH (DD/MMM/YY)	
MAILING ADDRESS			
CITY		PROVINCE	POSTAL CODE
PERSONAL EMAIL ADDRESS	HOME PHONE NO.	CELL PHONE NO.	

Section 2 – Retirement Date

Your pension benefit shall not begin any earlier than the first of the month in which your application is received by the Pensions and Benefits office.

You've decided to retire on:	DD/MMM/YY
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Section 3 – Declaration of Marital Status

In accordance with the Civil Service Superannuation Act (CSSA) you must declare whether or not you have a spouse.

I have a spouse

Legally married

Common-law relationship

Separated

I do not have a spouse

Single

Widowed

Divorced

Separated

If You Have A Spouse, Provide the Following Information:

SPOUSE'S LAST NAME		SPOUSE'S FIRST NAME & INITIAL(S)	
DATE OF BIRTH (DD/MMM/YY)	EMAIL ADDRESS	PHONE NO.	
MAILING ADDRESS (if different than Plan Member)	CITY/TOWN	PROVINCE	POSTAL CODE

Section 4 – Direct Deposit Information

Your pension will be paid via direct deposit. Select one of the following:

I authorize the Pension Office to use my current Peoplesoft payroll deposit information for payment of my pension benefit.

OR

I have attached a void cheque or a direct deposit form from my financial institution.

Section 5 – Income Tax Credits

Income Tax Credits reduce the amount of tax withheld from your pension. Select one of the following:

I will reside in PEI and wish to claim the Basic Personal Amount for income tax credits.
No forms required.

I will reside in PEI and wish to claim **more** than the Basic Personal Amount for income tax credits.
Completed Federal and Provincial Personal Income Tax Credit Return (TD1) forms required.

I will reside in Canada, but outside of PEI.
Completed Federal and applicable Provincial Personal Income Tax Credit Return (TD1) forms required.

I will reside outside of Canada.
No forms required. Country of residence treaty will dictate the amount of income tax to be withheld.

Section 6 – In accordance with the Civil Service Superannuation Act (CSSA) you must immediately notify the Pensions and Benefits office if:

- Your address changes, or
- You accept employment which requires you to contribute to the CSSF.

Please note - you should make arrangements to have someone notify the Pensions & Benefits office at the time of your death.

Section 7 - I, the member, hereby make application for my pension benefit.

Signature:

Date:

Retirement Checklist

YOU MUST ...

Step 1: Notify your HR Manager of your intent to retire

Step 2: Complete and submit to the Pension and Benefits office the **Application for Monthly Pension Benefits** package, which includes:

Application for Monthly Pension Benefits

Copy of **one** of the following as proof of age:

- Driver's License
- Birth Certificate
- Passport
- Voluntary ID

If not using your Peoplesoft banking information, include Void Cheque or Direct Deposit form

If claiming anything other than the default Basic Personal Amount, include completed Federal and Provincial TD1 forms

Your pension benefit cannot begin any earlier than the first of the month in which your application is received by the Pensions and Benefits office.

Step 3: Contact Johnson Inc. about your eligibility for retirement Group Insurance Benefits

Pension & Benefits

Drop off: Sullivan Building, 3rd Floor
16 Fitzroy St.,
Charlottetown PE

Mail: PO Box 2000
Charlottetown PE
C1A 7N8

Fax: (902) 620-3096 **Scan & Email:** cssf@gov.pe.ca

Johnson Inc.

Charlottetown area: (902) 628-3537

Toll free: 1 (800) 371-9516

Visit www.mybenefitplan.ca and select the 'Retirees' link for information about retiree coverage options.