

# Form 13

## Spousal Request for Information

### ► Why complete this form?

**Complete this form** if the following statements are true:

- You are the spouse of one of the following:
  - a current, former, or retired member of a pension plan
  - the owner of a locked-in retirement account (LIRA), a life income fund (LIF) or a life annuity.
- You do NOT live with your spouse and have no plans to do so in the future.
- Your spouse earned the pension while working in Nova Scotia for an organization that is regulated by the Province of Nova Scotia.
- You want information to determine the value of the pension entitlement in order to divide that pension entitlement.

**Do NOT complete this form** if the following statements are true:

- You and your spouse have made an unequal division of other assets under the Matrimonial Property Act instead of dividing the pension benefit.
- You and your spouse have a domestic contract or court order that states that you are NOT entitled to receive pension benefits.
- You and your spouse have a domestic contract or court order dated BEFORE June 1, 2015, that provides for the division of the pension entitlement or the final settlement of your family property including the pension entitlement.

### 1 ► Give information about the pension plan, LIRA, LIF, or life annuity

Name of pension plan: \_\_\_\_\_

Registration number: \_\_\_\_\_

LIRA or LIF account number: \_\_\_\_\_

Name of the administrator  
or financial institution: \_\_\_\_\_

Address: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

### 2 ► Give information about the member, former member, retired member, or owner

Last name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Address: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

Date of birth (yyyy/mm/dd): \_\_\_\_\_

**3 ▶ Give your personal information**

Last name: \_\_\_\_\_  
First name: \_\_\_\_\_ Middle name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**4 ▶ Do you want to authorize a contact person to communicate with the Administrator on your behalf?**

Yes. **Continue to the next question.**

No. **Go to question 6.**

**5 ▶ Give information about the contact person**

Last name of contact person: \_\_\_\_\_  
First name: \_\_\_\_\_ Middle name: \_\_\_\_\_  
Company name, if there is one: \_\_\_\_\_  
Address: \_\_\_\_\_  
Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**6 ▶ Were you the spouse of the member, former member, retired member, or owner on the date that person retired?**

Yes.

No.

That person has not retired.

**7 ▶ When did you begin the spousal relationship with the member, former member, retired member, or owner? (Choose only one)**

on date we married (yyyy/mm/dd): \_\_\_\_\_

on the date we began a domestic partnership (yyyy/mm/dd): \_\_\_\_\_

on the date that appears in a court order (yyyy/mm/dd): \_\_\_\_\_

on the date chosen by me and my spouse (yyyy/mm/dd): \_\_\_\_\_

**Note:** The date chosen by you and your spouse cannot be earlier than the date you began living together in a common-law relationship, nor can it be later than the date you married.

 **8 ▶ Attach proof of the starting date of your spousal relationship**

Copy of marriage certificate attached.

Copy of domestic partnership attached.

Copy of court order or domestic contract attached.

Joint declaration of period of spousal relationship attached.

**9 ▶ When did your spousal relationship end? (Choose only one)**

on the date we separated with no likelihood of getting back together (yyyy/mm/dd): \_\_\_\_\_

on the date our divorce was granted (yyyy/mm/dd): \_\_\_\_\_

on the date that appears in a court order (yyyy/mm/dd): \_\_\_\_\_

other, please specify (yyyy/mm/dd): \_\_\_\_\_

we do not agree on our separation date

member's separation date (yyyy/mm/dd): \_\_\_\_\_

my separation date (yyyy/mm/dd): \_\_\_\_\_

 **10 ▶ Attach proof of the separation date**

Joint declaration of period of spousal relationship attached.

Copy of court order or domestic contract attached.

We do not have proof of our separation date.

**11 ▶ Sign the spousal confirmation and direction**

**I confirm** that the information that I have provided in this request is, to the best of my knowledge, true and correct.

**I direct** the administrator to give me the information I need to determine the value of the pension entitlements earned by the member, former member, retired member, or owner.

**I understand** that the administrator will give the information described above to my spouse.

<b>Signature:</b> _____	Date (yyyy/mm/dd): _____
Signature of witness: _____	Date (yyyy/mm/dd): _____

This confirmation and direction must be signed before a witness. Your witness

- must be at least 18 years of age
- must NOT be your spouse
- must see you sign the form
- must sign, print their name, and date this form immediately after seeing you sign and date this form

**12 ▶ Give information about the witness**

Last name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Address: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**13 ▶ Give this request to the administrator or insurance company that looks after the pension plan, LIRA, LIF, or life annuity.**

**Do not give this request** to the Department of Finance and Treasury Board, Pension Regulation Division

**Time-sensitive material:** An administrator must provide the requested information no later than 60 days after receiving the request.

*It is an offence under the Criminal Code for anyone to knowingly make or use a false document with the intent that it be acted upon as genuine.*

*This form is approved by the Superintendent of Pensions under the Pension Benefits Act.*

**Questions?** Email [pensionreg@novascotia.ca](mailto:pensionreg@novascotia.ca)

## **How we define spouse, domestic contract, member, former member, owner, and financial institution**

### **Spouse**

- The person you are married to.
- The person you are married to, if the marriage hasn't been legally ended.
- The person you thought you were married to, if you are still living together.
- The person you thought you were married to, if you have lived together within the last 12 months.
- The person you are living with as a registered domestic partner under the Vital Statistics Act.
- The person you have been living with in a conjugal relationship for at least one year, if neither of you are married to someone else.
- The person you have been living with in a conjugal relationship for at least three years, even if one or both of you are married to someone else.

### **Domestic contract**

A domestic contract means

- a written agreement that provides for a division between spouses of a pension benefit, deferred pension, or pension.
- a marriage contract as defined in the Matrimonial Property Act

**Member** – member of a pension plan

**Former member** – a person who is entitled to pension benefits and

- is no longer employed by the organization that provides the pension
- is no longer a member of the pension plan

Note: A person who had the right to some pension benefits earned by a spouse and is no longer in a relationship with that spouse is NOT considered a former member.

**Owner** – the owner of a locked-in retirement account (LIRA), a life income fund (LIF) or a life annuity.

**Financial institution** – a bank, a credit union, an insurance company, or any organization that invests money in financial assets