

Form 15

Request for Transfer

► Why complete this form?

Complete this form if the following statements are true:

- You are the spouse of one of the following:
 - a current or former member of a pension plan
 - the owner of a locked-in retirement account (LIRA) or of a life income fund (LIF).
- You do NOT live with your spouse and have no plans to do so in the future.
- Your spouse earned the pension benefit while working in Nova Scotia for an organization that is regulated by the Province of Nova Scotia.
- You have a certified copy of a court order or domestic contract regarding your share of the pension benefit.
- The court order or domestic contract was made on or after June 1, 2015.
- You want to transfer your share of the pension benefit when your court order or domestic contract is finalized.

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.

Keep in mind:

- You may only transfer your share of the defined benefit from a pension plan when your spouse is given that option.
- The administrator will let you know of your right to transfer when it arises.

1 ▶ Give information about the pension plan, LIRA, or LIF

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, 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 ▶ Attach a court order or domestic contract**

Certified copy of a court order attached.

Certified copy of a domestic contract attached.

5 ▶ Where do you want to transfer your share of the pension benefit?

to another pension plan. **Continue to the next question.**

to a locked-in retirement account (LIRA). **Go to question 8.**

to a life income fund (LIF). **Go to question 8.**

to a life annuity. **Go to question 8.**

6 ▶ Give information about the pension plan to which you want to transfer your share of the pension benefit

Name of employer: _____

Name of pension plan: _____


Registration number: _____

Name of plan administrator: _____

Address: _____

Postal code: _____ Phone number: _____

E-mail address: _____

 **7 ▶ Attach written confirmation from the administrator that the pension plan described above is registered under the pension benefits legislation in a Canadian jurisdiction or is a pension plan provided by the government in Canada.**

Confirmation attached. **Go to question 9.**

8 ▶ Give information about the LIRA, LIF, or life annuity to which you want to transfer your share of the pension benefit

Name of financial institution: _____

Address: _____

Postal code: _____ Phone number: _____

Type of policy or account, choose one:

LIRA

LIF

Life annuity

Policy or account number: _____

9 ▶ Sign the 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 make the transfer I have requested in this form.

I confirm that the transfer I have chosen to make in this form is my final decision.

I understand that once the administrator transfers my share of the pension benefit, I cannot change my mind and choose another kind of transfer.

Signature: _____	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

10 ▶ Give information about the witness

Last name: _____

First name: _____ Middle name: _____

Address: _____

Postal code: _____ Phone number: _____

11 ▶ 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

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

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 in the last 12 months.
- The person who is your 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) or of a life income fund (LIF).

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