

Form 17

Information from Administrator

► Why complete this form?

Complete this form if the following statements are true:

- You are the administrator of a pension plan, locked-in retirement account (LIRA), life income fund (LIF), or life annuity.
- You have received from the spouse of a member or owner a completed **Form 13: Spousal Request for Information**.
- The pension that gave rise to the benefits described above was earned by someone who worked in Nova Scotia for an organization that is regulated by the government of Nova Scotia.

Give this information to the spouse of the member or owner no later than 60 days after you received the request.

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

You may use this form to provide the information requested to the spouse OR you may provide the information in another format as long as it meets the requirements of the Pension Benefits Regulations.

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.

Questions? Call 902-424-8915 or email pensionreg@novascotia.ca

How we define spouse, domestic contract, member, owner, administrator, and YMPE

Spouse

- The person the member or owner is married to.
- The person the member or owner is married to, if the marriage hasn't been legally ended.
- The person the member or owner thought they were married to, if they are still living together.
- The person the member or owner thought they were married to, if they have lived together in the last 12 months.
- The member or owner's registered domestic partner under the Vital Statistics Act.
- The person the member or owner has been living with in a sexual relationship for at least one year, if neither is married to someone else.
- The person the member or owner has been living with in a sexual relationship for at least three years, even if one or both of them 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 – the member, former member, or retired member of a 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), life income fund (LIF), or life annuity

Administrator – the administrator of a pension plan, a financial institution that looks after a LIRA or LIF, or a life insurance company that looks after a life annuity

YMPE (Year's Maximum Pensionable Earnings) – the maximum amount of earnings used to calculate contributions and pensions under the Canada Pension Plan. This changes from year to year

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Information

From the administrator of a pension plan, LIRA, LIF, or life annuity

To the spouse of a pension plan member or owner of a LIRA, LIF, or life annuity

The following information responds to your request – **Form 13: Spousal Request for Information** received on (yyyy/mm/dd): _____

▶ **Information about the pension plan, LIRA, LIF, or life annuity**

Name of pension plan: _____

Registration number: _____

Account number of LIRA, LIF or life annuity: _____

▶ **Information about the member or owner**

Last name: _____

First name: _____ Middle name: _____

Address: _____

Postal code: _____ Phone number: _____

Identification number: _____

Date of birth (yyyy/mm/dd): _____

▶ **Information about a contact person authorized to communicate with the administrator on the member or owner's behalf, if one has been designated.**

Last name of contact person: _____

First name: _____ Middle name: _____

Company name, if there is one: _____

Address: _____

Postal code: _____ Phone number: _____

▶ **Information about the spouse**

Last name: _____

First name: _____ Middle name: _____

Address: _____

Postal code: _____ Phone number: _____

► **Information about a contact person authorized to communicate with the administrator on the spouse's behalf, if one has been designated.**

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

► **Information about the spousal relationship**

The spousal relationship began on the following date: (Choose only one)

- on date of the marriage (yyyy/mm/dd): _____
- on the date that began a domestic partnership (yyyy/mm/dd): _____
- on the date the spouses began living together in a common-law relationship (yyyy/mm/dd): _____
- on the date that appears in a court order (yyyy/mm/dd): _____
- on a date jointly chosen by the spouses (yyyy/mm/dd): _____

The spousal relationship ended on the following date: (Choose only one)

- on the date the spouses separated with no likelihood of getting back together (yyyy/mm/dd): _____
- on the date the divorce was granted (yyyy/mm/dd): _____
- on the date that appears in a court order (yyyy/mm/dd): _____
- on a date jointly chosen by the spouses (yyyy/mm/dd): _____
- other, please specify: _____ (yyyy/mm/dd): _____

Document on file to support the separation date:

- Joint declaration of period of spousal relationship
- Copy of court order or domestic contract
- There is no proof of a separation date

► **Information about the member or owner's benefit subject to division**

Type of retirement plan and member status (Choose all that apply)

- Pension plan. See appendix A
- LIRA or LIF. See appendix B
- Life annuity. See appendix C

▶ **Certification**

I declare that I am

the administrator of the plan

an agent or representative of the administrator authorized to complete this form and sign this certification

I certify that, to the best of my knowledge, the information in this form and in all appendices and attachments is true and accurate.

Name of administrator or administrator's authorized agent or representative:

Signature: _____ **Date (yyyy/mm/dd):** _____

▶ **Information about the administrator or the administrator's authorized agent or representative if one has been designated:**

Last name: _____ First name: _____

Position or title: _____

Company name: _____

Address: _____

Postal code: _____ Email: _____

Phone number: _____ Fax number: _____

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Appendix A: Pension plan

1 ► Information about the pension plan and benefits

Plan type:

single-employer pension plan

jointly-sponsored pension plan

multi-employer pension plan

individual pension plan

other _____

Benefit type:

final average earnings: final _____ of last _____ years

best average earnings: best _____ of last _____ years

career average earnings

flat benefit

defined contribution

other _____

2 ▶ Information for retired members

The retired member joined the pension plan on (yyyy/mm/dd): _____

Total pensionable service accumulated by the retired member during the entire period of employment as of the separation date: _____

Total pensionable service accumulated by the retired member during the period of the spousal relationship: _____

Payments to member

- monthly
- annual

Amount of payments

\$ _____ from the separation date to date of death

Bridging supplement

not applicable

\$ _____ to be paid from the separation date to age _____

2nd bridging supplement

not applicable

\$ _____ to be paid from the separation date to age _____

Is the pension indexed?

- Yes
- No

Survivor benefit – following the death of the member

There is no survivor benefit payable upon the death of the member.

The survivor benefit is _____ % of the member's lifetime pension which is payable for the lifetime of the spouse.

The number of remaining guaranteed payments of the member's lifetime pension from the separation date is _____.

The spouse's share of the bridging supplement is paid for a minimum of _____ payments.

Payments when no survivor benefit is payable – following the death of the member

The spouse's share of the member's lifetime pension is paid for a minimum of _____ payments.

The spouse's share of the member's bridging supplement is paid for a minimum of _____ payments.

Payments to spouse

The spouse is entitled to a share of the pension paid to the retired member. Based on the information provided, this would be _____ % of the benefit being paid.

Transfer options – No options available.

END OF INFORMATION FOR RETIRED MEMBERS.

3 ▶ Information for defined benefits

Total pensionable service accumulated by the member during the entire period of employment as of the separation date: _____

Total pensionable service accumulated by the member during the period of the spousal relationship: _____

Normal retirement age: _____

Early retirement age or options: _____

Termination benefit: _____

Postponed retirement: _____

Pre-retirement death benefit: _____

Defined benefit formula:

not applicable

Canada Pension Plan (CPP) or Old Age Security (OAS) offset formula:

not applicable

CPP or OAS integration formula and average YMPE used in the calculation:

not applicable

details: _____

Normal form of pension:

Ancillary benefits (bridging, disability, etc.)

not applicable

details: _____

Age when bridging benefits end:

not applicable

Consent benefits:

not applicable

details: _____

Minimum benefit formula:

not applicable

Pre-retirement indexation:

not applicable

details: _____

Post-retirement indexation:

not applicable

details: _____

Other relevant provisions:

not applicable

details: _____

Average pensionable annual salary, if required for the defined benefit pension formula:

not applicable

\$ _____

Total optional contributions as of the separation date:

not applicable

\$ _____

Total additional voluntary contributions as of the separation date:

not applicable

\$ _____

Accumulated lifetime pension as of the separation date:

monthly \$ _____

annual \$ _____

Accumulated bridging or supplemental benefit as of the separation date:

not applicable

monthly \$ _____

annual \$ _____

Canada Pension Plan reduction at age 65:

not applicable

\$ _____

Member's age at separation date: _____

Transfer options – No options available.

END OF INFORMATION FOR DEFINED BENEFITS. See *Next steps* – question 5 on page 11.

4 ▶ Information for defined contribution benefits

Normal retirement age: _____

Early retirement age or options: _____

Termination benefit: _____

Postponed retirement: _____

Pre-retirement death benefit: _____

The **maximum share of the defined contribution benefit that may be assigned and transferred** to the spouse is 50% of the benefit earned during the relationship. Based on the information provided, this would be: _____ %

Total value of contributions including interest or investment earnings attributable to the member as of the separation date or the last day of the month immediately before the separation date:

\$ _____

Based on the information provided above, the **maximum sum to be given to the spouse** is:

\$ _____

Total additional voluntary contributions including interest or investment earnings attributable to the member as of the separation date or the last day of the month immediately before the separation date:

\$ _____

Note: There is no limit to the amount of additional voluntary contributions that may be assigned and transferred to the spouse.

Transfer options

option to transfer share of the pension benefit to a LIRA or LIF. Spouse must be 55 years old or older during the calendar year for a transfer to a LIF

option to transfer share of the pension benefit to a pension plan

option to become a limited member of the pension plan

END OF INFORMATION FOR DEFINED CONTRIBUTION BENEFITS.

5 ▶ Next steps

If you want to receive a proportionate share of the retired member's pension, or if you want to become a limited member of the pension plan, complete **Form 14: *Request to Become a Limited Member*** and send it to the administrator of the pension plan.

If you want to receive a proportionate share of the member's defined contribution benefit, complete **Form 15: *Request to Transfer*** and send it to the administrator.

Questions? Call 902-424-8915 or email pensionreg@novascotia.ca

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Appendix B: LIRA or LIF

The retired owner joined the pension plan on (yyyy/mm/dd): _____

Total pensionable service accumulated by the owner during their entire period of employment as of the separation date: \$ _____

Total pensionable service accumulated by the owner during the period of the spousal relationship: \$ _____

The maximum share of the LIRA or LIF that may be assigned and transferred to the spouse is 50% of the benefit earned during the relationship. Based on the information provided, this would be: _____%

Total value of contributions including interest or investment earnings attributable to the owner as of the separation date or the last day of the month immediately before the separation date:

\$ _____

Based on the information provided above, the sum to be given to the spouse is:

\$ _____

▶ **Transfer options**

option to transfer share of the LIRA or LIF to the spouse's LIRA or LIF. Spouse must be 55 years old or older during the calendar year for a transfer to a LIF

option to transfer a share of the LIRA or LIF to a pension plan

▶ **Next steps**

If you want to receive a proportionate share of the owner's LIRA or LIF, complete **Form 15: Request to Transfer** and send it to the administrator.

Questions? Call 902-424-8915 or email pensionreg@novascotia.ca

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Appendix C: Life annuity

The retired owner joined the pension plan on (yyyy/mm/dd): _____

Total pensionable service accumulated by the retired owner during the entire period of employment as of the separation date: _____

Total pensionable service accumulated by the retired owner during the period of the spousal relationship: _____

Payments to owner

monthly
annual

Amount of payments

\$ _____ from the separation date to date of death

Bridging supplement

not applicable

\$ _____ to be paid from the separation date to age _____

2nd bridging supplement

not applicable

\$ _____ to be paid from the separation date to age _____

Is the life annuity indexed?

Yes
No

Survivor benefit – following the death of the owner

There is no survivor benefit payable upon the death of the owner.

The survivor benefit is _____% of the owner's life annuity which is payable for the lifetime of the spouse.

The number of remaining guaranteed payments of the owner's life annuity from the separation date is _____.

The spouse's share of the bridging supplement is paid for a minimum of _____ payments.

Payments when no survivor benefit payable – following the death of the owner

The spouse's share of the owner's life annuity is paid for a minimum of _____ payments.

The spouse's share of the owner's bridging supplement is paid for a minimum of _____ payments.

Payments to spouse

The spouse is entitled to a proportionate share of the life annuity being paid to the retired owner. Based on the information provided, this would be _____% of the benefit being paid.

Transfer options – No options available.

► Next steps

If you wish to receive a proportionate share of the owner's life annuity, complete **Form 14: Request to Become a Limited Member** and send it to the administrator.

Questions? Call 902-424-8915 or email pensionreg@novascotia.ca