

# 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?** Email [pensionreg@novascotia.ca](mailto: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 conjugal 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 conjugal 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

# Form 17

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