

FORM P4 (Division of Pensions Regulation, s. 4 (1)(d))

REQUEST BY LIMITED MEMBER FOR TRANSFER OR SEPARATE PENSION

When to Use this Form

A Form P4 is used by a limited member to choose how to receive a share of benefits under a defined benefit provision if the member is not yet receiving a pension.

[Please print]

To: Administrator of plan

[Required] Name of plan _____

[Optional] Address of administrator _____

From: Spouse of member *[Note: "spouse" includes a person who has lived in a marriage-like relationship with the member for a continuous period of at least two years and also includes a former spouse.]*

[Required] Name of spouse _____

[Required] Address _____

[If available] Email address _____

[If available] Telephone _____

[Required] Social Insurance Number _____

[Required] Date of Birth _____

[The administrator will use this information to contact you about important matters. Make sure it is accurate and that you promptly advise the administrator of any changes.]

In relation to: Plan member

[Required] Name of member _____

[Optional] Address _____

[Optional] Email address _____

[Optional] Telephone _____

[At least one of the following is required] Date of Birth, Social Insurance Number, or Pension Plan Identity Number _____

[Optional] Employer of member _____

Request:

As the limited member named above, I request *[check the correct box]*

☐ that you

(a) transfer from the plan my proportionate share of the commuted value of the member's benefits in accordance with the *Family Law Act* and the *Pension Benefits Standards Act*, if permitted by the plan, and

(b) advise me in writing of the information that you require in order to do this.

☐ that you provide me with a separate pension from the plan.

[These options are only available after the member is allowed to receive a pension but the pension has not yet commenced. If this form is used for a supplemental pension plan or a plan for specified individuals, a lump sum transfer is not available, and a separate pension is not available until the member's pension commences, unless the administrator consents.]

Signed (*limited member*) _____

Date _____