

# Appendix C - Information Required for Tax Purposes

To be completed by the Exporting Pension Authority

## Nova Scotia Public Authority Pension Plans Reciprocal Transfer Agreement

### Identification

Surname: \_\_\_\_\_ Given Name and Initials: \_\_\_\_\_

Social Insurance Number \_\_\_\_\_

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

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Gender: M \_\_\_\_\_ F \_\_\_\_\_

### I. Pension Adjustment History:

Year	Pensionable Salary <sup>1</sup>	Service Credited <sup>2</sup>	PA <sup>3</sup>	PSPA <sup>4</sup>
1990	_____	_____	_____	_____
1991	_____	_____	_____	_____
1992	_____	_____	_____	_____
1993	_____	_____	_____	_____
1994	_____	_____	_____	_____
1995	_____	_____	_____	_____
1996	_____	_____	_____	_____
1997	_____	_____	_____	_____
1998	_____	_____	_____	_____
1999	_____	_____	_____	_____
2000	_____	_____	_____	_____
2001	_____	_____	_____	_____
2002	_____	_____	_____	_____
2003	_____	_____	_____	_____
2004	_____	_____	_____	_____

### II. Pension adjustment for the last year of participation in the Exporting plan:

1. Was a PA attributed to the benefits credited during that year? Yes \_\_\_\_\_ No \_\_\_\_\_

2. If so, what was the value of that PA? \$ \_\_\_\_\_

### III. Amount transferred to another pension plan or to a registered retirement savings plan (RRSP):

1. Excluding the present transfer, will an additional amount be transferred to another pension plan, to a RRSP, a LRRSP or a LIF? <sup>5</sup> Yes \_\_\_\_\_ No \_\_\_\_\_

2. If so, what is the amount? \$ \_\_\_\_\_

<sup>1</sup> The pensionable salary recognized under the plan.

<sup>2</sup> The service credited for calculation of benefits under Exporting Plan.

<sup>3</sup> PA: Pension Adjustment declared for the year.

<sup>4</sup> PSPA: Past Service Pension Adjustment determined during the year.

<sup>5</sup> LRRSP: Locked In Registered Retirement Savings Plan; LIF: Life Income Fund.