

Appendix C - Information Required for Tax Purposes

To be completed by the Exporting Pension Authority

Public Service Defined Benefit 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 ¹	Service Credited ²	PA ³	PSPA ⁴
1990	_____	_____	_____	_____
1991	_____	_____	_____	_____
1992	_____	_____	_____	_____
1993	_____	_____	_____	_____
1994	_____	_____	_____	_____
1995	_____	_____	_____	_____
1996	_____	_____	_____	_____
1997	_____	_____	_____	_____
1998	_____	_____	_____	_____
1999	_____	_____	_____	_____
2000	_____	_____	_____	_____
2001	_____	_____	_____	_____
2002	_____	_____	_____	_____
2003	_____	_____	_____	_____
2004	_____	_____	_____	_____
2005	_____	_____	_____	_____
2006	_____	_____	_____	_____
2007	_____	_____	_____	_____
2008	_____	_____	_____	_____

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? \$ _____

¹ The pensionable salary recognized under the plan.

² The service credited for calculation of benefits under Exporting Plan.

³ PA: Pension Adjustment declared for the year.

⁴ PSPA: Past Service Pension Adjustment determined during the year.

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? ⁵ Yes _____ No _____
2. If so, what is the amount? \$ _____

⁵ LRRSP: Locked In Registered Retirement Savings Plan; LIF: Life Income Fund.