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official text of the agreement.**

**NATIONAL PUBLIC SERVICE  
PENSION TRANSFER AGREEMENT**

A Multilateral Reciprocal Transfer Agreement for  
Public Service Defined Benefit Pension Plans

*Amended and Restated as of June 12, 2007.*

v.2007-June

**WHEREAS** each of the Pension Authorities has considered it desirable to enter into an agreement:

- (a) to enable a person who meets the requirements of this agreement to transfer from one Pension Plan to another without loss of pensionable service credits accumulated in any one or more of the Pension Plans; and
- (b) to provide to this person a pension to be funded by the transfer of funds to the Pension Plan of retirement by each of the Pension Authorities of the plans in which this person has accumulated pensionable service credits.

**NOW THEREFORE THIS AGREEMENT WITNESSETH:**

**1. PURPOSE OF AGREEMENT**

This agreement is a multilateral reciprocal transfer agreement intended to facilitate the transfer of funds and pensionable service credits between Pension Plans of Participating Authorities. The provisions of this agreement apply only to the extent they do not contravene the provisions of the Pension Plans, the *Income Tax Act*, Canada, or any other applicable legislation. In the case of a conflict between any provision of this agreement and a provision of a Pension Plan, the *Income Tax Act*, Canada, or any other applicable legislation shall prevail.

**2. EFFECTIVE DATE**

This agreement is effective and binding on a Pension Authority from the date that a Pension Authority signs this agreement and continues in force until the date of termination of participation in the agreement as hereinafter provided.

**3. DEFINITIONS**

- Exporting Authority: The Pension Authority of the Exporting Plan.
- Exporting Plan: The Pension Plan under which a person ceased participation and from which funds and pensionable service credits will be transferred to the Importing Plan.
- Importing Authority: The Pension Authority of the Importing Plan.
- Importing Plan: The Pension Plan in which a person is participating and to which funds and pensionable service credits will be transferred from the Exporting Plan.
- Participating Authority: An authority that operates a defined benefit pension plan in respect of public service employees that is included, or eligible to be included, in this agreement.
- Pension Plan: The pension plan in place for the public service employees of the Participating Authority that is registered under the *Income Tax Act*, Canada.
- Pension Authority: The organization responsible for the administration of a pension plan of the public service of a Participating Authority.

**4. ELIGIBILITY CRITERIA**

A transfer of funds and pensionable service credits shall be made in accordance with the terms of this agreement, but subject to any restrictions applicable to a Participating Authority as enumerated in Appendix H, in respect of a person who satisfies all of the following conditions:

- (a) has ceased to occupy a position covered by the Exporting Plan and has also ceased participation in that plan;

- (b) has been participating in the Importing Plan for the equivalent of at least 20 working days before requesting a transfer;
- (c) has pensionable service credits in the Exporting Plan and has repaid to the Exporting Plan in accordance with the rules of that Plan any amount received upon termination of employment as a refund of excess contributions;
- (d) is not in receipt of a service pension from either the Exporting or the Importing Plan;
- (e) has approved the transfer of funds and pensionable service credits by signing "Appendix B-Transfer Estimate and Acceptance Form" and sending it to the Importing Authority within 60 days of the date this form was sent to the person by the Importing Authority.
- (f) has, subject to section 4.1, met condition (e) above within three years of commencing participation in the Importing Plan or within three years of the Importing Plan becoming a party to this agreement, whichever is later.

4.1 Section 4 (f) shall only apply where the Importing Plan has filed a declaration with the other Parties to this agreement that it wishes to impose the time limit stipulated in article 4 (f) and in any event shall only apply with respect to a person who began participating in the Importing Plan on or after January 1, 2005. Such declarations, if any, shall be recorded in "Appendix G1 - Record of Parties Making a Declaration Pursuant to Article 4.1."

*Note regarding time limits*

If the Exporting Authority has been informed that the pension of a person requesting a transfer could be subject to division upon marriage breakdown or an assignment of benefits under applicable maintenance enforcement legislation, the transfer procedures will be delayed until settlement of these matters and the time frames provided in this agreement will be extended accordingly.

If a person is unable to meet the 60 day time limit referred to in clause (e) above for medical reasons, the time limit may be extended by the respective Pension Authorities upon submission of medical evidence satisfactory to the respective Pension Authorities.

**5. EMPLOYEE CONTRIBUTIONS MADE IN RESPECT OF PAST SERVICE**

Any person who, at the time "Appendix B-Transfer Estimate and Acceptance Form" is sent, was making payments to the Exporting Authority in respect of past service has 60 days to pay the outstanding amount to the Exporting Authority.

If all or a part of the outstanding amount is not paid within the time limit prescribed above, benefits and pensionable service credits shall be established in accordance with the terms of the Exporting Plan.

**6. EXCLUDED BENEFITS**

Any additional voluntary contributions made by a person to the Exporting Plan are excluded from this agreement unless the Importing Authority agrees to accept such additional voluntary contributions pursuant to the terms of the Importing Plan.

Benefits provided under a retirement compensation arrangement or any unregistered supplemental benefits arrangement are excluded from this agreement.

**7. TRANSFER VALUE**

The transfer value is the lesser of (a) and (b) below, at the date of payment:

**(a) Amount available from the Exporting Plan**

This amount is equal to the actuarial value of benefits credited to the person in accordance with the terms and conditions of the Exporting Plan, on the date the person ceased participating in the plan. To that amount is added interest, calculated monthly at the rates stipulated in "Appendix D-Actuarial Methods and Assumptions" for the particular pension authority, from the date of termination up to the date the "Appendix A-Transfer Information Request and Authorization Form" is received by the Importing Authority. In no case, however, will the actuarial value be less than the value of the person's termination or retirement benefits that would be otherwise payable from the Exporting Plan at the same date.

The actuarial value is based on the age of the person and the annual pensionable salary received by the person on the date of termination of participation in the Exporting Plan, including any retroactive adjustments to that salary resulting from a labour settlement, if the Pension Authority has been informed of such adjustment before the transfer is made. The salary is projected in accordance with the assumptions stipulated in "Appendix D-Actuarial Methods and Assumptions" for the particular Pension Authority.

Any excess employee contributions are treated according to the terms of the Exporting Plan.

**(b) Amount requested by the Importing Plan**

This amount is equal to the actuarial value of benefits to be credited to the person in accordance with the terms and conditions of the Importing Plan on the date the Importing Authority received the "Appendix A-Transfer Information Request and Authorization Form."

The actuarial value is based on the age of the person and the annual pensionable salary received by this person on the date the Importing Authority received "Appendix A-Transfer Information Request and Authorization Form", including any retroactive adjustment to that salary resulting from a labour settlement, if the Pension Authority has been informed of such adjustment before the transfer is made. The salary is projected in accordance with the assumptions stipulated in "Appendix D-Actuarial Methods and Assumptions" for the particular Pension Authority.

**8. DIVISION OR ASSIGNMENT OF PENSION BENEFITS**

Any benefits credited to the person in the Exporting Plan that are subject to division under applicable family relations legislation or a Court order in respect of marriage breakdown, or subject to assignment under applicable maintenance enforcement legislation, shall be finalized under the provisions of the Exporting Plan before a transfer may be executed under this agreement. The Exporting Authority shall complete the form "Appendix F- Details of Pension Credit Splitting, re: Marriage Breakdown Other Assignment" and forward it to the Importing Authority at the same time as "Appendix B- Transfer Estimate and Acceptance Form."

**9. COMPLIANCE WITH LEGISLATION**

The amount transferred shall respect the rules for registered pension plans imposed by the Income Tax Act. Any reduction resulting from the application of such rules is dealt with according to the terms of the Exporting Plan. The Exporting Authority shall complete and send to the Importing Authority "Appendix C- Information Required For Tax Purposes."

**10. ADMINISTRATION**

Upon receipt of "Appendix A-Transfer Information Request and Authorization Form," and "Appendix B- Transfer Estimate and Acceptance Form," the Exporting Authority will complete Section I of "Appendix B- Transfer Estimate and Acceptance Form" and send it, within 60 days, to the Importing Authority.

The Importing Authority shall, within 60 days of receiving it from the Exporting Authority, complete Section II of "Appendix B-Transfer Estimate and Acceptance Form" and send two copies to the person requesting the transfer.

#### **11. TRANSFER OF FUNDS**

Upon receipt of "Appendix B-Transfer Estimate and Acceptance Form," duly signed by the person requesting the transfer, the Exporting Authority will pay the Importing Authority the transfer value as determined under Section 6 above, plus interest on that amount calculated monthly at the rates stipulated in "Appendix E-Interest Rates", from the date the "Appendix A-Transfer Information Request and Authorization Form" was received by the Exporting Authority to the last day of the month in which payment is made. The Exporting Authority will make every effort to complete the payment within 60 days following receipt of the signed "Appendix B-Transfer Estimate and Acceptance Form."

#### **12. RESIDUAL BALANCE IN EXPORTING PLAN**

If the transfer value is less than the value of termination or retirement benefits to which the person is otherwise entitled on the date of termination under the provisions of the Exporting Plan, then the Exporting Authority treats the difference according to the provisions of the Exporting Plan.

#### **13. PENSIONABLE SERVICE CREDITED BY THE IMPORTING PLAN**

- (a) If the transfer value is equal to the amount requested by the Importing Plan in accordance with Section 7, the Importing Plan shall recognize the total service credited to the person by the Exporting Plan as pensionable service for pension calculation purposes.
- (b) If the transfer value is less than the amount requested by the Importing Plan in accordance with Section 7, the Importing Plan shall recognize a portion of the service credited to the person by the Exporting Plan for pension calculation purposes.
- (c) The portion referred to in (b) above shall be equal to the ratio of the amounts determined in accordance with Sections 7(a) and 7(b) respectively.
- (d) Pensionable service shall be recognized beginning with the most recent.
- (e) Subject to subsection (f), all the pensionable service recognized by the Exporting Plan for pension calculation purposes shall be recognized for pension eligibility purposes under the Importing Plan, unless the rules of the Importing Plan do not permit this, although this may differ from the amount of pensionable service used by the Importing Plan for pension calculation purposes, pursuant to subsection 13 (b).
- (f) In the situation of a division of pension benefits upon marriage breakdown or assignment of benefits under maintenance enforcement legislation, the amount of pensionable service which would otherwise be used for pension calculation purposes pursuant to subsections (a) or (b), as the case may be, shall, subject to the Importing Plan's rules and requirements, be used for pension eligibility purposes by the Importing Plan.

#### **14. ADDITIONAL PAYMENT**

- (a) A person to whom Section 13(b) applies may elect to pay directly to the Importing Authority, in accordance with the terms of the Importing Plan, all or part of the difference between the amount transferred by the Exporting Authority and the amount required by the Importing Authority. This difference is determined at the date the amount is transferred and includes interest at the rates prescribed in "Appendix" E-Interest Rates." Upon payment of the difference, the person shall, for the purpose of pension calculation in the Importing Plan, be given credit for the corresponding pensionable service from the Exporting Plan.

- (b) If the benefits credited to a person in the Exporting Plan are subject to division upon marriage breakdown or an assignment of benefits under applicable maintenance enforcement legislation, any difference resulting from that division or assignment cannot be purchased pursuant to this Section.

**15. BENEFITS ESTABLISHED IN ACCORDANCE WITH THE TERMS OF THE IMPORTING PLAN**

Following the transfer of funds, or other payment as specified in this agreement, and the crediting of related pensionable service for pension eligibility and pension calculation purposes, benefits are determined exclusively in accordance with the provisions of the Importing Plan.

**16. ORDER OF PAYMENT**

The amount determined in Section 7, which the Exporting Authority pays to the Importing Authority, is recognized firstly as the person's contributions plus interest as determined by the provisions of the Exporting Plan. The balance is recognized as the employer's contributions.

**17. SAME PERIOD OF SERVICE**

When a person has credit in both the Exporting Plan and the Importing Plan for the same period of service, the credit in the Exporting Plan is not taken into account by the Importing Plan under this agreement.

**18. PARTIES TO THIS AGREEMENT**

This agreement applies to the persons participating in the Pension Plans listed in "Appendix G-Record of Parties to the Agreement" administered by the various Pension Authorities that are Parties to this agreement.

Such approval of each Party to this agreement must be in writing. Once unanimous approval has been obtained, the Pension Authority being added as a party to this agreement must sign a sufficient number of signature pages such that one original may be delivered to each then-existing Party to this agreement. Appendix G to this agreement will then be amended to include the new Party, with copies of the revised Appendix G to forthwith be distributed to all Parties. If the new Party has identified any transfer restrictions in accordance with Section 4, or has made a declaration pursuant to section 4.1, and having completed an Appendix G1 and/or an Appendix H, Appendices G1 and/or H shall forthwith be distributed to all Parties.

A Pension Authority, as defined herein, who is not a Party listed in "Appendix G-Record of Parties to the Agreement" may, upon written request, be added as a Party to this agreement subject to the unanimous approval of the Participating Authorities who are Parties to this agreement at the time of the request.

**19. AMENDMENT TO THE AGREEMENT**

This agreement and all appendices to it, except "Appendix D-Actuarial Methods and Assumptions," may be amended from time to time by all of the Parties to this agreement. Such amendment must be in writing and may be effected by way of amending agreement or by the Parties re-executing an amended version of this agreement itself. An amendment will be effective 60 days following the date on which the last Party signs the amending agreement or amended version of this agreement, as the case may be.

The actuarial assumptions as outlined in "Appendix D-Actuarial Methods and Assumptions" for each Pension Authority may be amended by the particular Pension Authority. Such amendments will be effective 60 days after date of the notice in writing to all Parties to this agreement.

Amendments, however, will not affect any transfers requested before the effective date of the amendments, unless they are beneficial to the applicant and the Pension Authorities involved approve the use of the amendments.

**20. TERMINATION OF PARTICIPATION IN THE AGREEMENT**

A Party to this agreement may terminate participation in this agreement by providing notice, in writing, at least 90 days before the effective date of the termination. Such termination, however, shall not affect any then existing obligations of the terminating party with respect to the pension of any person on whose behalf funds have been transferred or are in the process of being transferred under this agreement prior to the date of termination.

**21. VALIDITY AND INTERPRETATION**

The headings used in this agreement are for convenience only and are not to be considered part of this agreement and do not in any way limit or amplify the terms and provisions of this agreement.

It is intended that all provisions of this agreement shall be fully binding and effective among the Parties, but in the event that any particular provision is found to be void, voidable or unenforceable, in whole or in part, for any reason whatever, then the provision, as affected, shall be deemed severed from the remainder of this agreement and all other provisions shall remain in full force.

This agreement shall enure to the benefit of and be binding upon the successors and assigns of the Parties to this agreement.

The Parties agree that this agreement, including its appendices, embodies the entire agreement of the Parties with regard to the matters dealt within it and that no understandings or agreements, verbal or otherwise, concerning such matters exist among the Parties except as expressly set out in this agreement.

In Witness Whereof, each Party listed in "Appendix G-Record of Parties to the Agreement" hereby executes this agreement by attaching its signature page, signed by the official(s) duly authorized for that purpose.

# Appendix A - Transfer Information Request and Authorization Form

## *Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement*

### Personal Data

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

Previous Surname (if applicable): \_\_\_\_\_

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

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

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

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

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

Current Employer: \_\_\_\_\_ Province: \_\_\_\_\_

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

Former Employer: \_\_\_\_\_ Province: \_\_\_\_\_

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

I hereby request that the Pension Plan Authorities of my current and former employers submit for my consideration two (2) copies of a transfer estimate under the transfer agreement between the Public Service Pension Plans. All personal information will be handled in a confidential manner, in accordance with the legislation.

**Note:** My pension benefits have been or are in the process of being split because of marriage breakdown.

Yes \_\_\_\_\_ No \_\_\_\_\_

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

\_\_\_\_\_  
Applicant's Signature

**Employee:** Upon completion, please forward this application to the pension plan administrator of your present employer.

# Appendix B - Transfer Estimate and Acceptance Form

## Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement

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

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

Date of application (date appendix "A" was received by the Importing Pension Authority): \_\_\_\_\_

### Please proceed as follows:

- 1) Check the data in Sections I and II. Please direct any questions on this data to the pension plan administrator of your present employer.
- 2) If you accept the transfer, complete Section III and return a copy of this form to the pension plan administrator of your present employer *within 60 days* from the date of this Appendix's covering letter.

When the transfer is completed, your plan administrator will send you a revised participation statement.

### Section I - Benefits from your Previous Employer (Exporting Plan)

1 Name of Employer \_\_\_\_\_

2 Registered Pension Plan Name \_\_\_\_\_

3 Periods of participation in plan : From \_\_\_\_\_ To \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4 Total service credited:

a) Years of service credited for **eligibility** to benefits: \_\_\_\_\_

b) Years of service credited for **calculation** of benefits: \_\_\_\_\_

5 Annual pensionable salary at the date of termination: \$ \_\_\_\_\_

6 Pension split following a marriage breakdown (if applicable):

Exporting plan: please complete Appendix G and attach it to this form.

7 Sum of contributions with interest (if any) at the date Appendix "A" was received by the Importing Authority: \$ \_\_\_\_\_



A reduction of service resulting from a pension split following a marriage breakdown cannot be bought back ( \_\_\_\_\_ years of service).

### Section III - Acceptance

I hereby agree to the transfer of the benefits **from**

Exporting Plan (Registered Name) \_\_\_\_\_

**to**

Importing Plan (Registered Name) \_\_\_\_\_

I understand that the estimates provided in Sections I and II have been calculated as of the date of application and that the final amounts will be determined at the date of transfer of funds to the Importing Plan. A confirmation of the transferred value and the service to which I am entitled will be provided to me at that time.

In consideration of the payment made by the Exporting Pension Authority, I hereby release the Exporting Pension Authority from any responsibility towards me regarding the service and benefits transferred under the agreement.

I also understand that if the amount transferred from the Exporting Plan is less than the amount required by the Importing Plan to recognize all the pensionable service credited to me under the Exporting Plan, I am entitled to purchase all or part of the shortfall, in a lump sum or in such other manner as the Importing Pension Authority may determine, in accordance with the applicable pension legislation.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_\_.

\_\_\_\_\_  
Applicant's Signature

**Employee:** Upon acceptance, please return this form to the pension plan administrator of your present employer.

# Appendix C - Information Required for Tax Purposes

## 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 <sup>1</sup>	Service Credited <sup>2</sup>	PA <sup>3</sup>	PSPA <sup>4</sup>
1990	_____	_____	_____	_____
1991	_____	_____	_____	_____
1992	_____	_____	_____	_____
1993	_____	_____	_____	_____
1994	_____	_____	_____	_____
1995	_____	_____	_____	_____
1996	_____	_____	_____	_____
1997	_____	_____	_____	_____

### 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.

# Appendix D - Actuarial Method and Assumptions

## *Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement*

Name of Public Authority: \_\_\_\_\_

Registered Pension Plan Name: \_\_\_\_\_

1 Actuarial Method (describe): \_\_\_\_\_

2 Assumptions: Effective date: \_\_\_\_\_

a Economic Assumptions:

1 Interest Rate:

2 Inflation Rate:

3 YMPE Growth Rate:

4 Salary Growth Rate: 3.50% + Merit Increase (see following scale)

Merit Increase

5 Rate of Increase of Maximum Benefits under Income Tax Act:

6 Rate of Indexing of Pension in Payment

b) Demographic Assumptions:

1 Mortality Table:

2 Gender Split:

3 Proportion With Spouse:

4 Age Difference Between Spouses:

5 Retirement Age:

6 Withdrawal Rate:

7 Disability Rate:

Note: If more room is needed to describe your assumptions, please use overleaf or attach a separate page to this form.

## Appendix E - Interest Rates

### *Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement*

1 **Interest rates:**

The five year moving average yield on Government of Canada 90 day Treasury Bills (CANSIM Series 14007) for the five year period ended on the 31st day of December of the year two years preceding the year to which the rate is to apply, calculated to one decimal place.

2. **Method of calculation:**

Interest is compounded annually and is calculated from the beginning of the month following the date on which interest will start accumulating to the end of the month in which interest will cease accumulating.

# Appendix F - Details of Pension Credit Splitting re: Marriage Breakdown/Other Assignment

To be completed by Exporting Pension Authority and attached to Appendix "B"  
*Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement*

## Personal Data

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

Previous Surname (if applicable): \_\_\_\_\_

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

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

Registered Pension Plan Name: \_\_\_\_\_

The following details for the above-named former plan member are provided in respect of (check one):

- \_\_\_\_\_ Pension Credit Splitting on Marriage Breakdown
- \_\_\_\_\_ Other Assignment (explain) \_\_\_\_\_
- \_\_\_\_\_

- I (A) Value of pension credits before split or other offset: \$ \_\_\_\_\_
- (B) Value of pension credits reserved for split or offset: \$ \_\_\_\_\_
- (C) Value available for transfer to Importing Plan (A - B): \$ \_\_\_\_\_

- II (A) Time period related to total pensionable service:
- from \_\_\_\_\_ to \_\_\_\_\_
- Corresponding pensionable service: years \_\_\_\_\_ months \_\_\_\_\_ days \_\_\_\_\_
- (B) Time period related to pension credit split or offset:
- from \_\_\_\_\_ to \_\_\_\_\_
- Corresponding pensionable service: years \_\_\_\_\_ months \_\_\_\_\_ days \_\_\_\_\_

Additional comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date \_\_\_\_\_ Signature \_\_\_\_\_

Print Name \_\_\_\_\_ Position Title \_\_\_\_\_

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**Note to Exporting Plan Administrator:** Please attach a copy of the court order (or other supporting documents) for the files of the Importing Plan.

## Appendix G - Record of Parties to the Agreement

### *Public Service Defined Benefit Pension Plan Reciprocal Transfer Agreement*

Participating Authority/ Organisme participant	Name of Registered Pension Plan(s)/ Nom du régime de pension agréé	Date Signed/ Signée le
Province of Newfoundland and Labrador	Public Service Pension Plan	November 17, 1999
Province of Nova Scotia	Public Service Superannuation Plan	October 19, 1999
Province of Prince Edward Island	Civil Service Superannuation Plan	August 31, 2000
Province of New Brunswick/la Province du Nouveau-Brunswick	Public Service Superannuation Plan	November 15, 1999
Province of Quebec	La Commission administrative des régimes de retraite et d'assurances	February 26, 2002
Ontario Pension Board		
OPSEU Pension Trust		
Province of Manitoba	The Civil Service Superannuation Fund	September 1, 2002
Province of Saskatchewan		
Province of Alberta		
British Columbia Public Service Pension Plan Board of Trustees	British Columbia Public Service Pension Plan	November 17, 2004
British Columbia College Pension Plan Board of Trustees	British Columbia College Pension Plan	March 17/2005
British Columbia Municipal Pension Plan Board of Trustees	British Columbia Municipal Pension Plan	March 18/2005
British Columbia Teachers' Pension Plan Board of Trustees	British Columbia Teachers' Pension Plan	March 24/2005

## **Appendix G1 - Record of Parties Making a Declaration Pursuant to Section 4.1**

### *Public Service Defined Benefit Pension Plan Reciprocal Transfer Agreement*

**Name of Public Authority:** \_\_\_\_\_

**Registered Pension Plan Name:** \_\_\_\_\_

#### **Declaration**

# Appendix H - Record of Restrictions of Parties on the Transfer of Funds and \ or Pensionable Service Pursuant to Section 4

## *Public Service Defined Benefit Pension Plan Reciprocal Transfer Agreement*

Participating Authority/	Name of Registered Pension Plan(s)

Plan Restrictions
Items of Note

**Signature Page** - Attached to  
Reciprocal Transfer Agreement between  
Defined Benefit Public Service Pension  
Plans

For \_\_\_\_\_  
\_\_\_\_\_

Name of Authorized Official \_\_\_\_\_

Title of Authorized Official \_\_\_\_\_

Signature of Authorized Official \_\_\_\_\_

Name of Witness \_\_\_\_\_

Title of Witness \_\_\_\_\_

Signature of Witness \_\_\_\_\_

Date \_\_\_\_\_