



## Required Information for a Pension Valuation

Name of participant:

\_\_\_\_\_

Date of birth of participant:

mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

Name of employer:

\_\_\_\_\_

Date of marriage:

mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

Name of pension plan:

\_\_\_\_\_

Date of valuation/separation:

mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

Circle the applicable employment status at the time of separation and, if not active, indicate the effective date of that status:

Active – Full Time

Active – Part Time

Terminated : mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

Retired: mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

On disability mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

A statement of pension entitlements that includes :

- Date of employment and of enrolment to the pension plan
- Pensionable service at the date of marriage (if any)
- Pensionable service at the date of valuation
- Accumulated contributions in virtue of the pension plan at the date of valuation
- Annual pension benefits accrued at the date of valuation
- Particulars of any service « buyback » (if any)

Note: A statement of pension entitlements with all the above information is generally available from your employer. We can obtain it on your behalf if a signed consent form is provided to our firm.

Indicate the current employment status and, if it differs from the one above, the date corresponding to the change.

\_\_\_\_\_

mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

Approximate value of other sources of retirement income at the date of separation :

RRSP :

Non-registered Assets :

Name of Spouse:

\_\_\_\_\_

Date of birth of spouse:

mm/ \_\_\_\_ dd/ \_\_\_\_ yy/ \_\_\_\_\_

If your spouse has a pension to be valued, do you authorize us to prepare the valuation if so requested?    Yes \_\_\_\_                      No \_\_\_\_

Please forward to GML