



**Required Information for a Pension Valuation**

**Name of participant:**

\_\_\_\_\_

**Name of employer:**

\_\_\_\_\_

**Name of pension plan:**

\_\_\_\_\_

**Date of birth of participant:**

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

**Date of marriage:**

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

**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 date of enrolment to pension plan
- Pensionable service at date of marriage (if any)
- Pensionable service at date of valuation
- Particulars of any service "buyback"
- Annual pension benefits accrued at the date of valuation
- Accumulated contributions with interest at the date of valuation

**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