



TO BE COMPLETED BY THE EXPORTING PENSION PLAN

Transfer of Pension Credits to University of Toronto

Requirements to calculate Service Purchase, PA Transfer Amount and PSPA relative to transfer of funds from a Registered Pension Plan to the University of Toronto Registered Pension Plan

The University of Toronto Pension Plan is a Defined Benefit plan and contains a pension portability clause which allows us to accept an importing member's pension credits from a Registered Canadian pension plan and backdate the member's service appropriately in our plan. The registration number of the University of Toronto Pension Plan is 0312827. Naturally, the transferring member must have pension credits which have not been settled and the transfer process itself must be approved by the exporting pension plan administrators.

Please note that the funds transferred to the University of Toronto Pension Plan will be administered in accordance with the Ontario Pension Benefits Act and will not be used to provide an annuity prior to the age of 55.

Thank you in advance for your cooperation in filling this form. *Please submit the completed form to University of Toronto, Pensions, HR & Equity, 215 Huron St, 8th Floor, Toronto, ON M5S 1A2.*

Member's Name: _____ SIN: _____

Date of Birth: _____

Name of Employer: _____

Name of Pension Plan: _____ Plan Registration No: _____

Date of Employment: _____
Month/Day /Year

Date of Plan Enrollment: _____
Month/Day/Year

Date of Termination of Membership: _____ Total Credited Service _____
Month/Day/Year Yrs.

Date of Termination of Employment: _____
Month/Day/ Year

Member's Name: _____

Funds Available for Transfer: Locked In: \$ _____

Non Locked In due to Member's Excess Contribution: \$ _____

Non Locked In due ITA Maximum Transfer Limit: \$ _____

Calculation Date of Funds Available for Transfer: _____
Month/Day/Year

Type of Plan: **check one and please complete page 2:**

1. Defined Benefit: please provide Accrual Formula:

 2. Defined Contribution

 3. Hybrid Defined Benefit/Defined Contribution:

a) Is DB value higher than DC _____ (Y/N), if yes, please Provide Accrual formula

b) Is DC value higher than DB _____ (Y/N).

Please provide details of periods that the member did not accrue pension benefits if any. A breakdown of periods by year is required.

Yr _____ Period of non accrual: Fr: _____ To: _____

Yr _____ Period of non accrual: Fr: _____ To: _____

Yr _____ Period of non accrual Fr: _____ To: _____

Column A Year	Column B Credited Service	Column C Pensionable Earnings	Column D Pension Adjustment	Column E PSPA
	Please prorate part time service. Please indicate if weeks, months or years	Please choose one of the following: <input type="checkbox"/> Annualized <input type="checkbox"/> Actual		
1990				
1991				

Column A Year	Column B Credited Service	Column C Pensionable Earnings	Column D Pension Adjustment	Column E PSPA
	Please prorate part time service. Please indicate if weeks, months or years	Please choose one of the following: <input type="checkbox"/> Annualized <input type="checkbox"/> Actual		
1992				
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2016				
2017				

(Signature of Plan Representative)

(Date)