

# CWA/ITU Pension Plan (Canada)

CRA Registration No. 0554717

# Monthly Pension Application

This application should be submitted at least one month in advance of the date your pension is to begin, but no earlier than 90 days from the beginning of the month in which you wish to retire. Please print and be sure to **SIGN** and **DATE** the application. Mail the completed application and all supporting documents to the address indicated at the end of this form.

## Applicant Information

Name (Last)		(First)		(Middle)		Sex	
						M	F
Address (Mailing)						Suite No.	
City		Province	Postal Code		Telephone Number		
Local Union No.		Social Insurance Number					
Date you retired or plan to retire:		Month	Year	Date you last worked or will work for the union:		Month	Year

## Marital Information

Please circle one option only.

Married      Common-law      Separated      Divorced      Widowed      Single

Name of Pension Partner (if applicable)

Name (Last)		(First)		(Middle)		Sex	
						M	F

You must provide a copy of your marriage certificate. If you are unable to provide a copy of your marriage certificate, you must complete a declaration of marital status. If you are not married or if you are living in a common-law relationship, you must complete a declaration of marital status.

Social Insurance Number

## Dates of Birth

Member's Date of Birth	Month	Day	Year	Pension Partner's Date of Birth (if applicable)	Month	Day	Year

You must provide a copy of your and your pension partner's (if applicable) proof of age. Examples of proof documents required are: Birth Certificate, Passport, Citizenship Certificate, and Immigration Papers. If you cannot provide any of the above, please complete a declaration of proof of age.

## Direct Deposit Information

Name of Institution (please attach a void cheque)

Account No.										Bank No.			Bank Transit No.			

**COMPLETE REVERSE SIDE AS WELL**

**Beneficiary Information**

**You may complete this section if you do not have a pension partner, or if your pension partner has signed a pension partner waiver form. If you do not name a beneficiary, all pension benefits payable upon your death, will be paid to your estate.**

I hereby revoke any previous designation of beneficiary and I hereby designate the following named beneficiary(ies) to receive the amount of pension benefits, if any, payable at my death, under the Rules and Regulations of the fund. I reserve the right to revoke and change this designation at any time by giving written notice to the fund.

Name (Last)	(First)	(Middle)	Sex	
			M	F

Address (Mailing)

City	Province	Postal Code

Date of Birth (Month Day Year)	Relationship

**Applicant Declaration**

I hereby apply for a monthly pension from the CWA/ITU Pension Plan (Canada). The statements made in this application are true to the best of my knowledge and belief. I understand a false, misleading or inaccurate statement shall be sufficient reason for the denial, suspension or discontinuance of benefits under the pension plan and the Board of Trustees shall have the right to recover any payments made to me because of a false, misleading or inaccurate statement.

\_\_\_\_\_  
Signature of Member

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Name of Witness (please print)

**You will be notified in writing of the decision made by the Board of Trustees regarding your application or if any additional information is required.**

Please return this form, with your original signature by mail to:

Ellement Consulting Group  
10154 108 St NW  
Edmonton AB T5J 1L3

Phone: (780) 452-5161 Toll Free: 1-800-770-2998

## Authorized Documents for Proof of Age

Listed in order of preference, these are the only acceptable forms of proof of age:

1. Birth Certificate
2. Passport
3. Citizen Certificate
4. Immigration Papers
5. Baptismal Certificate
6. Native / Metis Status Card
7. Military Identification

Original documents are not required. **Please note a driver license is not acceptable.**

NOTE: If you cannot provide a photocopy of any of the above documentation, please complete a Declaration Re: Proof of Age and submit it to our office along with photocopies of two pieces of identification (i.e. driver license and health care) showing your date of birth.

IN THE MATTER OF AN APPLICATION BEING MADE TO THE  
CWA/ITU PENSION PLAN (CANADA)

I, \_\_\_\_\_ of the city of \_\_\_\_\_, in the  
province of \_\_\_\_\_, DO SOLEMNLY DECLARE THAT:

1. In connection with an application that I have made to the CWA/ITU Pension Plan (Canada), which was signed  
by me on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, I have represented to the plan that:

I do not have a "Pension Partner"; or

I have a "Pension Partner" named \_\_\_\_\_, and our relationship  
commenced on the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, and has continued to the present time.

2. I understand that the definition of a "Pension Partner" as defined by the *Supplemental Pension Plans Act*, in  
the province of Quebec, (i.e. spouse or common-law partner) means a person who:

- (i) are married or in a civil union, or
- (ii) are living in a conjugal relationship for a period of not less than 3 years, if the member of the pension  
plan is neither married nor in a civil union, or
- (iii) are living in a conjugal relationship for a period of not less than 1 year, if the member of the pension  
plan is neither married nor in a civil union, if at least one child is born, or to be born, of their union; or  
they have adopted, jointly, at least one child while living together in a conjugal relationship; or one  
person has adopted at least one child who is the child of the other person, while living together in a  
conjugal relationship.

AND I make this declaration conscientiously believing it to be true and knowing that it is of the same force and  
effect as if made under oath and by virtue of the *Canada Evidence Act*.

DECLARED BEFORE ME in the \_\_\_\_\_ )  
of \_\_\_\_\_, in the Province \_\_\_\_\_ )  
of \_\_\_\_\_, this \_\_\_\_\_ day \_\_\_\_\_ )  
of \_\_\_\_\_, 20 \_\_\_\_\_ )  
\_\_\_\_\_ )  
\_\_\_\_\_ )

A COMMISSIONER FOR OATHS (signature) \_\_\_\_\_ )  
in and for the Province of \_\_\_\_\_ )

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

\_\_\_\_\_  
Name of Commissioner (Please Print)

\_\_\_\_\_  
Expiry Date of Commissioner

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# CWAITU Pension Plan (Canada)

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# Electronic Deposit of Pension Payments

As a pensioner (or a beneficiary receiving payments), I authorize the fund to electronically deposit my monthly pension payments directly into the bank account described below. I understand I can change this authorization by sending a written notice to the fund office. I also understand my death will end the automatic deposit of pension payments without otherwise affecting future payments to which my beneficiary may be entitled.

Name of Institution			
Address			
City	Province	Postal Code	
Name(s) of Account Holder(s)			
Account No.	Bank No.	Bank Transit No.	

**\* Please attach a VOIDED cheque if funds are to be deposited into a chequing account.**

If you require assistance providing the required information with respect to your bank account, please contact your financial institution.

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Signature of Pensioner or Beneficiary receiving payments

Please return this form, with your original signature by mail to:	Ellement Consulting Group 10154 108 St NW Edmonton AB T5J 1L3 Phone: (780) 452-5161 Toll Free: 1-800-770-2998
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