Ironworkers Ontario Pension Plan

Termination Option Form (Locked-in with cash option)

Instructions

This is a two-page form. Please complete both pages, sign and date this form, and return it with the following:

- ☐ Proof of your age (***original or certified copies*** of your birth certificate, citizenship certificate, valid passport, or valid driver's license)
- ☐ Canada Revenue Agency form T2151
- ☐ For your "locked-in" funds, a locking-in agreement (confirmation of compliance)

Return to:

Ontario Ironworkers/Rodmen Benefit Plan
Administrators Corporation
111 Sheppard Avenue East
North York, Ontario
M2N 6S2

Telephone 416-223-0383 or 1-800-387-8075

1. Member Details

Last Name:_____ First Name:_____

Middle Name:_____ ☐ S.I.N. or ☐ Member Certificate Number: _____

Date of Birth:_____
Day / Month / Year

Complete Mailing Address - Street:_____ Phone #: _____

City/Town:_____ Province:_____ Postal Code:_____

Country: _____ Email Address:_____

☐ I have been a dues-paying Ironworker since: Day:_____ Month:_____ Year:_____ Current Local: _____

2. Former Spouse Confirmation

Please indicate whether your pension is subject to a domestic contract or court order under the Family Law Act (Ontario). A "domestic contract" means a marriage agreement, separation agreement, cohabitation agreement, paternity agreement or family arbitration agreement.

☐ My pension is not subject to a domestic contract or court order.

☐ My pension is subject to a domestic contract or court order (please attach a copy.)

3. Termination Payment Option *(Check and place your initial beside your selection)*

I understand that the option I choose below represents full settlement of my rights under the Ironworkers pension plan. If I later re-enter the plan, my period of membership before termination will not count toward an 85-point pension.

I wish to choose the following transfer option for the locked-in portion of my one-time pension payment (check one only):

☐ _____ (Initial) Locked-in RRSP _____ (name of financial institution) _____ (plan number)

☐ _____ Insurance company to buy lifetime annuity _____ (name of insurance company)

☐ _____ Another employer's pension plan _____ (plan registration number)

I wish to choose the following transfer option for the remaining portion of my one-time pension payment (check one only):

☐ _____ Taxable cash payment

☐ _____ Transfer to non locked-in RRSP _____ (name of financial institution)

_____ (plan number)

4. Privacy

The Trustees know that confidentiality of personal information is important. Any information you provide to us will be kept in a benefits file with the Administrator. Access to your information will be limited to:

- authorized staff, representatives of the plan, and the Administrator who require access in order to perform work related to the administration of the plans;
- individuals at the actuarial consulting firm appointed by the Trustees who require access in order to perform work related to the administration of the plan;
- individuals to whom you have granted access;
- individuals authorized by law.

You have the right to request access to the personal information in your file, and if necessary, correct any inaccurate information.

Authorization *(Must be completed)*

I hereby apply for my termination benefits from the Ironworkers Ontario Pension Plan. I certify that all the information provided on this form is accurate and true.

I authorize the use of my social insurance number by the Trustees of the Ontario Ironworkers Benefit and Pension Plans and their appointed agents for identification, administration and tax reporting purposes. I also agree to the collection, holding, sharing and use of my personal data for the following purposes:

- to determine eligibility for benefits;
- for ongoing plan management and cost analysis.

Member Signature _____ Date _____
Day / Month / Year

Witness Signature _____ Date _____
anyone 18 or over including a family member — Day / Month / Year

Witness Name _____ Address of Witness _____
please print