

1000 - 1801 Hamilton Street REGINA SK S4P 4W3 Phone: (306) 787-2684 in Regina 1-877-506-6377 (Toll free) Fax: (306) 787-0244 Email: mepp@peba.gov.sk.ca

## **Pension Portability Information Request**

1 Tell Us About You (Please Print)				
Social Insurance Number:	Please proceed to next field using the Tab button			
Last Name:	First Name & Initial:	:		
Birthdate (dd/mm/yyyy): / /				
Primary Phone Number:	Email Address:			
Mailing Address:				
City/Town/Village:	Province:	Рс	stal Code:	
Name of Previous Employer's Pension Plan (Exporting Pension Plan):				
Phone Number:				
Mailing Address:				
City/Town/Village:	Province:	P	ostal Code:	
Previous Employer:				
Current Employer:	Date of Hire (dd/mm	/yyyy):	/	/
Member Authorization for Transfer of Infor	mation			
As a member of the Municipal Employees' Pension Plan (MEPP), I request that the administrators of the exporting pension plan and MEPP submit a transfer <b>estimate</b> for my consideration to determine if I want to transfer pension money and pensionable service from the exporting plan to MEPP.				
I understand that the personal information supplied will be handled in a confidential manner and will be given only to those persons authorized to process my application.				
	Date:		/	/
Signature of Member	_	day	month	year



Mepp			
2 To be completed by the Administr	ation of the Exporting Plan		
Name of Exporting Plan:			
Registration Number:			
Date Employee Joined Plan (dd/mm/yyyy):			
Date Employee Terminated from Plan (dd/mm/yyyy)			
Total Eligibility Service:			
Total Pensionable Service:			
The Municipal Employees' Pension Plan is a defined b	penefit pension plan.		
Total dollar amount available for transfer	<b>5</b>		
The Pension Adjustment Reversal (PAR) if any	\$		
Date of Calculation of dollar amounts	/ / / day month year		
A transfer of funds would be in full satisfaction of all plan in respect of the period of pensionable service i	•	Yes	No
If no, the employee has been informed of rights and obligations.		Yes	
Please attach a list of the following historical	information by year:		
actual pensionable earnings by year	nr;		
<ul><li>eligibility service credited by year;</li><li>pensionable service credited by year</li></ul>	ar.		
annual pension adjustment (PA) rep			
<ul> <li>any past service pension adjustment</li> </ul>	nts reported for the member.		

## Certification by the Administrator of the Exporting Plan

certification by the rightmistrator of the Exporting right					
Name of Plan Administrator:					
Fitle:					
Phone Number:					
hereby certify that the information given above is correct according to	our records.				
Authorized Signature of Plan Administrator	Date:	/ day	month	/ 	
Authorized Signature of Flan Administrator		duy	month	усаі	



OR

3 To be comple	eted by MEPP			
Importing Plan: Municipa	al Employees' Pension Plan	Registration Numb	per: <b>0355321</b>	
MEPP Member Number:				
Amount required to purcl	hase Total Pensionable Service a	vailable for transfer by ex	porting plan:	
Amount required to purc	hase remaining service:			
Pensionable Service that	can be purchased in MEPP by tra	ansfer amount:		
Past Service Pension Adju	ıstment (PSPA) if any:			
Certification by the	Administrator of the Imp	orting Plan		
Name of Plan Administrat	tor: Municipal Employees' Pens	sion Plan		
Title: Pension Information	on Officer	Phone Number: <b>1-</b>	877-506-6377	
I hereby certify that the in	formation given above is correct	t according to our records	5.	
Authorized Signature of	Plan Administrator	Date: _	/ / / day month	/ year
4 Member's Ac	cceptance of Transfer			
Time Limit:				
	er this Portability Agreement, this signature by MEPP in Step 3 of t e form to MEPP.			
Acceptance:				
I hereby auth	information provided to me and orize the administrator of the exprelease the administrator of the MEPP.	porting plan to transfer th	ne amount shown in Sect	
a) the amour	nts transferred to MEPP under th			ons of MEPP
b) the inform	enefits will be paid in accordance nation supplied in this form is an f transfer and a confirmation of t	estimate and the final am	nounts will not be determ	nined until
executors)	sfer pursuant to this Portability A I who may have an entitlement p nt under the exporting plan with	oursuant to the service be	ing transferred, have any	

**In witness whereof** I have signed this application: Date: Signature of Member Signature of Witness • must not be spouse or any beneficiary **Print Name** 

I choose not to transfer my pension and service at this time.



## Glossary

**Current Employer** – your present Municipal Employees' Pension Plan (MEPP) participating employer.

**Defined Benefit Pension Plan** - A pension plan that provides a benefit based on a formula.

**Eligibility Service** – the number of years and fractions of years that you were employed with your former employer including the time that you were employed but not contributing to the pension plan.

**Importing Plan** – MEPP, which is the pension plan of your present employer.

**Locking-In** – refers to the point at which you become vested in the Plan. Locked-in contributions and interest must be used to provided pension benefits at retirement and cannot be withdrawn as cash. In MEPP, if you terminate employment prior to retirement, locked-in money must be used to establish a deferred pension or transferred to a locked-in retirement account (LIRA).

**Pension Adjustment (PA)** – a lump-sum value of benefit entitlement earned during the year.

**Pension Adjustment Reversal (PAR)** – a reinstatement of personal Registered Retirement Savings Plan (RRSP) room when the benefit paid from the pension plan is less than the sum of the Pension Adjustments.

**Pensionable Earnings** – earnings on which pension contributions were made.

**Pensionable Service** - Service used in a pension calculation to determine a member's pension benefit.

**Portability Agreement** – an individual agreement between two registered pension plans that allows you to transfer pension benefits and service from one registered pension plan to another when you change employers.

**Previous Employer** – your employer before you became a municipal employee and joined MEPP.

**Past Service Pension Adjustment (PSPA)** – the reduction of RRSP room as a result of purchasing pensionable service under the importing plan.

Website: www.peba.gov.sk.ca