



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