

Form 2

Application for a Statement of Benefits that May be Issued at the Plan Administrator's Discretion

Date of benefits valuation: Date of the end of the conjugal relationship
Spousal situation: Married, not in family mediation, with or without institution of an action for divorce, separation from bed and board or civil annulment of marriage.

You can use this form if:

- you are married;
- you and your spouse are no longer living together;
- you have **not** asked for the services of a family mediator with respect to divorce, separation from bed and board or civil annulment of marriage; and
- you want to know the total value of the benefits accumulated in a pension plan **as at the date of the end of your conjugal relationship*** and the value of the portion accumulated during your marriage up to that date.

The plan administrator does not have to issue this statement of benefits.

Contact the administrator before making your application to be sure that a statement will be issued. The administrator's address can be found on the statement that the plan member receives at regular intervals or you can ask the employer for the administrator's address.

* If an application for divorce, separation from bed and board or civil annulment of marriage has been filed with the Court and you want a valuation of the benefits accumulated **as at the date of institution of the action**, that is, as at the filing date, use Form 3, **Application for a Statement of Benefits Following Institution of the Action**.

Important information

You cannot use this form to **apply for a simulation** of the effects of partition of the employment earnings recorded under the Québec Pension Plan.

You must send this form to the **pension plan's administrator**, not to Retraite Québec.

You do not have to use this form to make your application; it is provided for your convenience.

You can use this form only if the plan member works in Québec and the plan is subject to the Québec *Supplemental Pension Plans Act*.

Covered plans include pension plans offered by employers in the private, municipal and university sectors and some plans in the parapublic sector, whose activities are under Québec's provincial jurisdiction. The following plans are **not** covered:

- public sector pension plans administered by Retraite Québec (known as the CARRA prior to 1 January 2016);
- public and private plans under federal jurisdiction (banks, interprovincial transport and telecommunications, federal public service, etc.);
- group RRSPs.

Regardless of where a pension plan member lives, the place where he or she **works** while accumulating benefits in a pension plan determines whether the Québec *Supplemental Pension Plans Act* applies. This is the case, for example, for a person who works in Québec, even if his or her pension plan is administered outside Québec or is registered with a supervisory agency outside Québec.

Civil union spouses

The Québec *Supplemental Pension Plans Act* gives civil union spouses the right to obtain a statement of benefits after the institution of proceedings to dissolve or annul their civil union. However, the manner in which that right may be exercised has not yet been determined.

Form 2

Please print.

Information on the identity of the pension plan member

Family name		Given name	
Member's identification number			
Name of pension plan			
Address (number, street, apartment)			
City	Province	Country	Postal code
Telephone home	area code	other	area code extension

Information on the identity of the spouse

Family name		Given name	
Address (number, street, apartment)			
City	Province	Country	Postal code
Telephone home	area code	other	area code extension

Declaration of the date on which the conjugal relationship ended

We want the value of the benefits accumulated in the member's pension plan to be calculated as at the date of the end of our conjugal relationship.

We hereby declare that the date on which our conjugal relationship ended is year month day

_____ Member's signature

_____ Spouse's signature

Document to enclose (see instructions)

- **Proof of the date of marriage**

Member's signature

I hereby apply for a statement of the benefits accumulated under my pension plan as at the date of the end of our conjugal relationship.
I consent to the sending of a copy of the statement of benefits to my spouse.

Member's signature

Given name and family name

Date year month day

**Do not send this form to Retraite Québec.
Send the completed form, with the required document, to the pension plan administrator.**

Instructions - Form 2

Application for a Statement of Benefits that May be Issued at the Plan Administrator's Discretion

This application must be sent to the **pension plan's administrator** and not to Retraite Québec. The administrator's address can be found on the statement that the plan member receives at regular intervals or you can ask the employer for the administrator's address.

Information on the identity of the pension plan member

The family name, given name and home address of the pension plan member must be given.

If possible, you should also give the member's social insurance number, employee number or any other information that will enable the plan administrator to identify him or her.

If you know the name of the pension plan, it should also be given to facilitate finding the member's account information. The name of the plan is shown on the documents that the member receives from the plan administrator.

If possible, you should also give the member's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

Information on the identity of the spouse

The family name, given name and home address of the pension plan member's spouse must be given.

If possible, you should also give the spouse's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

Declaration of the date on which the conjugal relationship ended

The date on which the conjugal relationship ended must be given because that date is used to calculate the value of the accumulated benefits. This part of the application must be signed by both of the spouses.

Document to enclose

Since the requested statement of benefits will indicate the value of the benefits accumulated during the marriage, it is essential for you to provide a document proving the date of marriage, such as a certificate of marriage issued by the Registrar of Civil Status. Any other document proving the date of marriage and acceptable to the pension plan administrator can be provided.

To obtain a marriage certificate, consult the Registrar of Civil Status's Internet site (www.etatcivil.gouv.qc.ca), under the heading "Certificate and copy of an act".

Signature of the member

The application must be signed by the plan member. The statement of benefits will be issued in two copies. One will be sent to the plan member and the other to his or her former spouse.