

**Form 1**  
**Application for a Statement of Benefits in the Course of Family Mediation**

Date of benefits valuation:            Date of the end of the conjugal relationship  
Spousal situation                        Married, in the course of 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 are using the service 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 of those benefits accumulated during your marriage up to that date.

\* 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.



## **Instructions - Form 1**

### **Application for a Statement of Benefits in the Course of Family Mediation**

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.

Once the administrator receives this form, the statement of benefits must be sent to the member **and** his or her spouse within **60 days**.

#### **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 former spouses.

#### **Mediator's declaration**

A pension plan administrator is not required to provide the value of the benefits accumulated as at the date of the end of the conjugal relationship unless there is pre-hearing mediation concerning a family matter (family mediation). This section of the form is a declaration that a mandate for such mediation has been given and accepted.

The mediator must be accredited by a professional order authorized to give such accreditation. A mediator may be a lawyer, notary, psychologist, orientation counselor, social worker or, in certain cases, a person employed in a youth protection centre (CPEJ).

To find an accredited family mediator, you can consult the Ministère de la Justice's Internet site, at [www.justice.gouv.qc.ca](http://www.justice.gouv.qc.ca), under the heading "Are you looking for a family mediator?".

Your mediator must sign this section of the form. If possible, give his or her telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

#### **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](http://www.etatcivil.gouv.qc.ca)), under the heading "Certificate and copy of an act".

#### **Signature of the applicant**

The application must be signed by the member or by his or her spouse. However, regardless of who makes the application, 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 spouse.