



# Offer of OMERS membership (new or amalgamating employers)

**To the employee/councillor:**

As of the date you are first eligible to enrol, shown in Section 4, you have the option to enrol in and contribute to the OMERS Primary Pension Plan (OMERS Plan). Use this form to confirm your decision to join the OMERS Plan or not. Joining the OMERS Plan also means joining the OMERS Retirement Compensation Arrangement (RCA) for the OMERS Plan (as applicable).

Return the completed form as soon as possible to your employer.

**To the employer:**

Use this form to offer OMERS membership to a continuous full-time employee/councillor or an other-than-continuous full-time (OTCFT) employee who is eligible for enrolment but for whom membership is voluntary. (More information about full-time and OTCFT employees follows on the next page.)

Please keep a copy of this completed form indefinitely.

If the employee/councillor elects to join OMERS, complete an *e-Form 102 - Enrolling a member*. The date of enrolment is the later of:

- the first date the employee/councillor becomes eligible; or
- the date the employee/councillor elects to join the OMERS Plan.

Providing OMERS with your personal information is considered consent for its use and disclosure for the purposes set out in our Privacy Statement, as amended from time to time. You can find out more about our collection, use, disclosure and retention of personal information by reviewing our Privacy Statement at [www.omers.com](http://www.omers.com).

**SECTION 1 - EMPLOYEE INFORMATION**

|  |            |                       |           |
|--|------------|-----------------------|-----------|
| Employee Number (if known)   |            | Date of Birth (m/d/y) |           |
| <input type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Ms.<br><input type="radio"/> Other: | First Name | Middle Name           | Last Name |

**SECTION 2 - EMPLOYEE ELECTION**

Date of hire with employer/start of continuous term as councillor:

Do you wish to enrol in the OMERS Plan at this time?

Yes. Please sign below.                       No. Please complete section 3.

Employee's/Councillor's Signature \_\_\_\_\_ Date (m/d/y) \_\_\_\_\_

**SECTION 3 - EMPLOYEE WAIVER OF MEMBERSHIP OFFER**

I confirm that:

- I understand that I am eligible to become a member of the OMERS Plan.
- I have been given information about the OMERS Plan.
- I choose not to become a member of the OMERS Plan.
- I understand that, should I wish to apply to join the OMERS Plan at a future date, it is my responsibility to contact my employer for this purpose.
- **For OTCFT employees only:** I understand that if I apply to join the OMERS Plan at a future date, I must again meet the eligibility requirements before I can enrol. My OMERS membership would be effective from the date I elect to join the OMERS Plan.
- **For CFT employees/councillors only:** I understand that if I remain a CFT employee/councillor, I can join the OMERS Plan at a future date. My OMERS membership would be effective from the date I elect to join the OMERS Plan.

Employee's Signature \_\_\_\_\_ Date (m/d/y) \_\_\_\_\_

## SECTION 4 - EMPLOYER INFORMATION

|                  |       |              |
|------------------|-------|--------------|
| Name of Employer |       | Group Number |
| Contact Name     | Title |              |

Employer participation date

Authorized Signature

Date employee/councillor is first eligible to enrol

## SECTION 5 - DEFINITIONS

### Other-than-continuous full-time (OTCFT) employees

OTCFT employees may include short-term, casual, temporary, seasonal, student, part-time, 10-month or contract employees.

OMERS membership for OTCFT employees may be voluntary. If voluntary, an employer must offer OMERS membership to an OTCFT employee the first time the employee meets the eligibility requirements.

#### OTCFT employees are eligible if, during each of the **two immediately preceding calendar years**:

- they worked at least 700 hours (including overtime) with any OMERS participating employer; or
- they earned at least 35% of the YMPE, including overtime and vacation pay, with any OMERS participating employer.

The criteria can be met through employment with one or more OMERS participating employers during the two-year eligibility period.

### Compulsory membership (for OTCFT employees hired on or after the participation date)

OMERS membership for all (or any) class of OTCFT employees may be compulsory if stated in the employer's participation bylaw or resolution. In that case, OTCFT employees must enrol in OMERS as a condition of employment on the date of hire.

If the employer's participation bylaw or resolution is amended to make OMERS membership compulsory, all new eligible OTCFT employees must be enrolled when hired, as a condition of employment. Existing OTCFT employees must be offered a choice.

### Continuous full-time employees

For OMERS purposes, continuous full-time employees are those who:

- regularly work 12 months in every year; and,
- belong to a class of employees for which regular employment hours are no less than 32 hours per week.

OMERS membership for continuous full-time employees/councillors hired before the employer's participation date is voluntary. For those hired on and after the employer's participation date, membership is compulsory; they must enrol in OMERS immediately when they are hired.