



## Advance Election Option (for normal or early retirement)

**This form is for a member who is retiring and wants to receive the pension more quickly by waiving rights to pension information normally provided by OMERS before the pension starts.**

Under the Ontario *Pension Benefits Act*, a member has the right to receive certain information about their pension and any other options they may have before OMERS processes the pension. However, a member can waive rights to that information if they want to receive their pension more quickly.

Complete Sections 1 to 4. To elect this option, the member must sign the waiver in Section 4 below and send the required documents with this form.

To help us serve you better, submit your documents quickly and securely using the e-access portal. Start a new conversation, attach your files, and submit.

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).



**Consider registering for myOMERS. It's convenient and secure as online banking. With myOMERS you can:**

- Print your T4A slip
- Change your address and banking information
- View your annual pension statement

**It's easy to register for myOMERS: go to [www.omers.com/myomers](http://www.omers.com/myomers). You will need your OMERS membership number, which you will find on your Pension Report.**

### SECTION 1 - MEMBER INFORMATION - to be completed for all requests

Group Number	OMERS Membership Number	Date of Birth (m/d/y)	Phone
<input type="radio"/> Mr. <input type="radio"/> Mrs. <input type="radio"/> Ms. <input type="radio"/> Other:	First Name	Middle Name	Last Name

### SECTION 2 - REQUIRED DOCUMENTS

#### Documents required for advance election

1. A cheque marked "void" (or a photocopy) or the following bank deposit information:

Name of Bank			
Transit Number	Institution Number	Bank Account Number	Phone
Address (street number and name)		City	Province    Postal Code

2. Completed federal and provincial TD1 income tax forms (for Canadian residents only). If you do not submit completed TD1 forms, we will assume the basic personal amounts to calculate income tax. These forms are available at [www.omers.com/member-forms](http://www.omers.com/member-forms).

## SECTION 3 - SUPPORTING INFORMATION - to be completed if member is retiring

Marital status of the member as at the date of retirement:

☐ Single
 ☐ Married
 ☐ Common-law
 ☐ Separated
 ☐ Divorced

### Spouse Information

☐ Mr.
 ☐ Mrs.
 ☐ Ms.
 ☐ Other:

First Name

Middle Name

Last Name

Date of Birth (m/d/y)

## SECTION 4 - MEMBER WAIVER

By signing below, (whether by hand or electronically), I acknowledge that I have decided to make this pension election in advance of receiving all of the information to which I may be entitled under the Ontario *Pension Benefits Act*, so that my application for a pension may be processed more quickly. I also understand that I will receive a *Pension confirmation form* giving the details of my pension benefit and a pension booklet once my pension has been processed. Finally, I understand that if I have a Supplemental Plan benefit with OMERS, this election and the banking information outlined above also apply to it.

**Note:** A member must sign by hand or select the electronic signature check box to sign electronically.

Member's Signature (By Hand)

Date (m/d/y)

Or

☐ Member's Signature (Electronic) - Selecting this check box constitutes my signature

Date (m/d/y)

To avoid processing delays, ensure the required documents are returned to OMERS with the Advance Election.