OMERS

Statutory declaration for proof of eligible service (member) - former employment with an OMERS employer

Use this form to confirm eligible service in the OMERS Primary Pension Plan, where, as a former employee, you have tried but are unable to obtain proof of your service from your former OMERS participating employer. The glossary on page 4 has definitions of terms used in this form.

How to use this declaration form:
- Complete sections 1 to 5. If you need more space for previous employment or service information, attach a separate sheet; include your name and OMERS membership number.
- Attach supporting documents (see definition on page 4), for the periods of employment in this declaration.
- Sign the completed declaration form (Section 5) in the presence of a Commissioner of Oaths.

Once the eligible service is confirmed, all or part of the eligible service may be purchasable in the OMERS Plan, resulting in an increase to your credited service.

To help us serve you better, submit your documents quickly and securely using your myOMERS account. Go to secure communications, start a new conversation, attach your files, and submit.

Any personal information provided on this form may be used to update your membership profile.

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.

SECTION 1 MEMBER INFORMATION

OMERS Membership Number*				Date of Birth (m/d/y)
First Name	Middle Name	Last Name		
Apt/Unit	Address	City	Province	Postal Code
Home Number	Mobile Number	Email		
Name of Current Employer				

**Your membership number appears on your Pension Report or any personalized statement from OMERS.*

SECTION 2 PREVIOUS EMPLOYMENT INFORMATION

If you have more than one period of employment information to report, please attach a separate sheet; include your name and OMERS membership number.

Employer Name	Start Date (m/d/y)	End Date (m/d/y)

Employment status during the period
Were you a full-time employee during the period? (See definitions of full-time and non-full-time employment on page 4.)

☐ Yes, I was a full-time employee ☐ No, I was not a full-time employee

Enter the percentage of full-time hours worked. If your percentage worked varies over the period, enter an average percentage of full-time hours spanning the entire period. For example, if you worked one year at 60% of full-time, and one year at 70% of full-time, enter 65%. ☐ %

OMERS

OMERS Membership Number

SECTION 3 BREAKS IN SERVICE

Important! If you were not a full-time employee, OMERS must ensure that the amount of eligible service from Section 2 is not overstated. To the best of your knowledge, please provide information on any breaks in service or absences during the employment period.

Were there any breaks in service, absences without pay, layoffs, or terminations during the period of employment in Section 2?

☐ Yes ☐ No

If yes, indicate the dates and the type of absence:

Start Date (m/d/y)	End Date (m/d/y)	Type of Absence
Start Date (m/d/y)	End Date (m/d/y)	Type of Absence
Start Date (m/d/y)	End Date (m/d/y)	Type of Absence
Start Date (m/d/y)	End Date (m/d/y)	Type of Absence
Start Date (m/d/y)	End Date (m/d/y)	Type of Absence

SECTION 4 PREVIOUS PENSION PLAN INFORMATION

Were you a member of a registered pension plan (other than the Canada Pension Plan) during the service period above?

☐ Yes ☐ No

If yes, please provide the following information:

Name of Registered Pension Plan	Plan Registration Number	Date you enrolled in the plan (m/d/y)

When you left your former employer, which option did you choose for the pension you earned? For example, deferred pension, or commuted value transfer to an RRSP or LIRA?

OMERS

OMERS Membership Number

SECTION 5 MEMBER'S DECLARATION to be signed in the presence of a Commissioner of Oaths

Please read carefully before signing this declaration in the presence of a Commissioner of Oaths.

I, _____ of _____ in the Province of Ontario,
Name Name of City

MAKE THIS SOLEMN DECLARATION conscientiously believing it to be true, and knowing that it is of the same force and effect as if made under oath by virtue of the *Canada Evidence Act*. I understand that OMERS reserves the right to request that I provide additional information to prove my prior service.

I confirm that I am not able to obtain proof of my employment service from my former employer for the period indicated in Section 2. I further understand that should new information come to light that contradicts this Declaration, OMERS will remove the ineligible service from my OMERS record and the following consequences may occur, including but not limited to:

- My early unreduced retirement date (without adjustment) shown on the OMERS pension report annually or shown previously in a pension estimate may no longer be valid;
- The estimated early retirement pension amount shown previously on a pension estimate may no longer be valid;
- If I have concluded a buy-back that involves inaccurate information, the purchase contributions without interest that are not permissible in the OMERS Plan will be returned as originally received (in cash or by RRSP transfer); I further understand there may be income tax implications if I have already claimed these contributions as a deduction to my taxable income;
- If my pension has already commenced, I understand that I will be required to pay back the additional pension received, including inflation increases, as a result of the ineligible service being included in my early retirement pension calculation.

_____ _____
Member's Signature Date (m/d/y)

SECTION 6 TO BE COMPLETED BY A COMMISSIONER OF OATHS*

Declared before me at _____ country of _____ in the province or territory of
Name of City, Town or Village Country

_____. Dated this _____ day of _____, _____.
Province or Territory Day Month Year

_____ _____
Name of Commissioner of Oaths Signature of Commissioner of Oaths

Municipal Official: please provide the office you currently hold and the municipality:

_____ _____
Office Municipality

Lawyer or judge: please provide your Law Society number:

Please affix seal/stamp here
if applicable

_____
Law Society Number

*A Commissioner of Oaths can be:

- a lawyer entitled to practice law in Ontario;
- a judge or justice of the peace;
- a Notary Public;
- certain municipal officials (such as a City Clerk); or
- a person appointed as a Commissioner by the Attorney General.

Breaks in service
A break in service could be any period of absence from an employer without pay:
- where you did not contribute to the pension plan or subsequently purchase the service in that plan; or
- your employer did not provide automatic pension coverage; or
- you did not have a PA reported.

Example: a period of pregnancy/parental leave, strike, or layoff (with or without recall rights).

If a valid termination for OMERS purposes has occurred (e.g., a contract or period of seasonal work ended), this should be reported as the end date of a period of employment.

Eligible service
Service with a participating OMERS employer that is not credited service in the OMERS Plan. Eligible service may be purchasable in the OMERS Plan. Eligible service can be used for the early retirement age+service Factor (90 Factor or 85 Factor) or 30-years-of-service provision. More about eligible service is in the OMERS *Member Handbook*, available at www.omers.com.

Employment status
- **Full-time**
  An employee hired as part of the permanent complement of the employer, who works full-time hours (minimum 32 hours per week, for 52 weeks of the year including vacation) as specified by the employer, is considered continuous full-time for OMERS purposes.
- **Non-full-time**
  Any other arrangement (including an employee working full-time hours on a time-limited contract basis) is not considered continuous full-time for OMERS purposes. For these periods, provide the percentage of full-time hours worked on average during the period.

Example: if full-time hours were 37.5 hours per week, and you regularly worked 30 hours per week, the percentage of full-time hours worked would be 80% (or 30 ÷ 37.5 = 0.80).

Pension adjustment (PA)
A pension adjustment (PA) is the deemed value of the annual benefit accrued in a pension plan during the tax year using a prescribed formula set by the Canada Revenue Agency (CRA). The PA is reported annually to the CRA (on the T4) and reduces a member's annual RRSP contribution room.

Registered pension plan (RPP)
A pension plan that has been registered with a pension regulator in a Canadian jurisdiction (such as the Financial Services Regulatory Authority of Ontario), and is also a registered plan under the *Income Tax Act* (Canada) and Regulations.

Supporting documents
OMERS requires that you must submit supporting documents with the statutory declaration demonstrating the periods of employment you are declaring, as follows:

- A letter from your former employer (if they are still in existence) confirming that they are unable to produce the service records. This document must be accompanied by:
  - T4 slips: copies of your T4 income tax slips for each of the calendar years of the employment period. Contact the CRA to request a copy of your T4s.
  - Record of employment: a copy of your Record of Employment (ROE) for the employment period you are declaring. Contact Service Canada to request a copy.
  - Pay stubs that apply to some or all of the period of time you are trying to purchase with the OMERS Plan. These must clearly state the name of the employer and the member's name.

T4 slip
The income tax form issued by your employer for reporting your taxable income during a calendar year. A T4 will show taxable income, pension adjustment (PA), a pension plan registration number, and any pension contributions made.