



1 Adelaide Street East, Suite 2900
Toronto ON M5C 3A7

REQUEST TO TRANSFER PENSIONABLE SERVICE UNDER A RECIPROCAL TRANSFER AGREEMENT

Telephone: 416-681-6100 Toll-free: 1-800-637-0024
Email: email@optrust.com Website: optrust.com

OPTrust ID or Employee Number

In order to transfer your pensionable service to the OPSEU Pension Plan (Importing Plan) please complete and sign the *Transfer Information Request and Authorization* form (Appendix A) below.

To qualify for a transfer under the *Reciprocal Transfer Agreement*, you must meet the following conditions:

- a. You have ceased to occupy a position covered by the Exporting Plan and have also ceased participation in that plan.
- b. You have been participating in the Importing Plan for the equivalent of at least 20 working days before requesting a transfer.
- c. You have pensionable service in the Exporting Plan and have repaid to the Exporting Plan in accordance with the rules of that Plan any amount received upon termination of employment as are fund of excess contributions.
- d. You are not in receipt of a service pension from either the Exporting Plan or the Importing Plan.

In addition, please note that if your pension is subject to division upon marriage breakdown or an assignment of benefits under applicable maintenance enforcement legislation, the transfer procedures will be delayed until these matters are settled.

If you satisfy all of the above conditions, please complete and return Appendix A to OPTrust by mail or through [secure email](#) as soon as possible to ensure you meet the eligibility requirements under the reciprocal agreement.

If you have questions, please contact us at optrust.com or send a email through your [Online Services](#) account.



APPENDIX A – TRANSFER INFORMATION REQUEST AND AUTHORIZATION FORM

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Telephone: 416-681-6100 Toll-free: 1-800-637-0024
Email: email@optrust.com Website: optrust.com

Public Service Defined Benefit Pension Plans Reciprocal Transfer Agreement

Personal Data:

Last Name		First Name	
OPTrust ID or Employee Number	Email Address	Date of Birth (Day-Month-Year)	
Mailing Address		City/Town	Province Postal Code

Current Pension Plan Authority

Plan Name: OPSEU Pension Plan

OPTrust

1 Adelaide Street East, Suite 2900
Toronto, ON, M5C 3A7

Telephone: 416 681-6100

Toll-free: 1 800 637-0024

Fax: 416 681-6175

Enrolment Date (Day-Month-Year):

Former Pension Plan Authority:

Mailing Address	City/Town	Province	Postal Code
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Termination from Plan (Day-Month-Year):

I hereby request that the Pension Plan Authorities of my current and former employers submit for my consideration two copies of a transfer estimate under the transfer agreement between the Public Service Pension Plans. All personal information will be handled in a confidential manner, in accordance with the legislation.

NOTE: My pension benefits have been or are in the process of being split because of marriage breakdown.

Yes No

Signature	Date (Day-Month-Year)
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Applicant: Upon completion, please forward this application to the Current Pension Plan Authority.