HOOPP
Healthcare of Ontario Pension Plan

Post-Retirement Spousal Benefits Application (New Spouse)

Use this form if you are a retired member applying for the Healthcare of Ontario Pension Plan (HOOPP) survivor benefits for a new spouse. You may not be able to provide survivor benefits for your new spouse if the qualifying spouse you had at retirement is living.

For information on when to use this form, please see the *Frequently Asked Questions (FAQ)*.

Please print clearly and review the form to ensure the information you provide is complete and accurate.

Section 1: Member Information

First Name

Last Name

SIN

Telephone Number

Address

City

Province

Postal Code

Email

Section 2: New Spouse Information

First Name

Last Name

Date of Birth (MM / DD / YYYY)

Date of Marriage/Start Date of Common-law Relationship (MM / DD / YYYY)

Section 3: Medical Information

Complete this section only if you have been married or in a common-law relationship with your new spouse for more than one year.

Please answer yes or no to the following questions by ticking the appropriate box:

Have you been diagnosed with any disease within the last three years?	☐ Yes	☐ No
Are you aware of any current impairment to your health?	☐ Yes	☐ No
Are you scheduled for an operation or surgery?	☐ Yes	☐ No

If you answered yes to any of these questions, please provide details in the space below:

Section 4: Member Certification

I certify that the information provided by me on this form is true and accurate. I certify that the person named in Section 2 is my qualifying spouse as defined below:

A qualifying spouse is a person who, at the time this form was signed, you are:

(1) Married to, but not separated from; or
(2) Living with in a common-law relationship
    i. Continuously for a period of not less than one year, or
    ii. Of some permanence, if he/she is the natural or adoptive parent of your child.

I authorize HOOPP to collect, use, retain and disclose my personal and health information on this form for the purpose of administering my benefits, including my survivor benefit, or providing pension services. I understand that HOOPP may disclose my personal or health information to authorized third parties under contract with HOOPP for these purposes.

Signature of Member

Date (MM / DD / YYYY)

Your privacy is important to us! At HOOPP, safeguarding the privacy of our members is a priority. We collect, use and disclose our members' personal information only for the purpose of administering the Plan; this refers primarily to administering pension benefits and paying pensions after retirement. For more information on HOOPP's privacy policies and practices, please visit **hoopp.com**.

Frequently Asked Questions

When should I use this form?

This form can be used to apply for survivor benefits for a new spouse following your retirement.

Who is a qualifying spouse?

A qualifying spouse is a person who, at the earlier of the date you retire or pass away, you are:

(1) Married to, but not separated from; or

(2) Living with in a common-law relationship

   i. Continuously for a period of not less than one year, or

   ii. Of some permanence, if he/she is the natural or adoptive parent of your child.

What if I have separated from the qualifying spouse I had at retirement?

Your qualifying spouse at retirement, as defined by HOOPP is by law entitled to receive any survivor benefits. However, if you have since separated and your qualifying spouse at retirement has waived their right to survivor benefits in accordance with Family Law, then you may be eligible to apply to provide survivor benefits to your new spouse. Please contact HOOPP Client Services for more information.

What proof documents are required with this application?

<u>Proof of age for your new qualifying spouse</u>

This document is necessary to determine the cost of providing post-retirement spousal benefits. HOOPP will accept a photocopy of **one** of the following documents:

- Birth or baptismal certificate
- Citizenship papers
- Indian status card
- Ontario age of majority card
- Valid Canadian driver's licence
- Valid Canadian passport

Please contact HOOPP Client Services if you are unable to provide us with one of these proof of age documents.

Proof of death

If you had a qualifying spouse at the time you retired, and that spouse has subsequently passed away, you must provide HOOPP with a photocopy of **one** of the following documents:

- Death certificate
- Funeral director's certificate

For more information, please visit hoopp.com or call HOOPP Client Services.

Healthcare of Ontario Pension Plan

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