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Identifying Benefit Recipients

Please read definitions and explanations on the reverse before completing this form.

**IMPORTANT! THIS FORM CANCELS ALL PREVIOUS DESIGNATIONS.
 YOU MUST RE-LIST ALL YOUR BENEFIT RECIPIENTS ON THIS FORM.**

OPSEU Pension Trust Fiducie du régime de
 retraite du SEFPO

It is important to complete this form at enrolment. During membership or at termination or after a divestment, complete this form to advise us of any change. To submit this information online, go to OPTrust Online Services at www.optrust.com.

1 Your Identification

Social Insurance Number	Date of birth (DD/MM/YYYY)		E-mail address	
	/ /			
Last name	First name and initial	Home telephone number	Business telephone number	
		()	()	
Home address: number and street	Apt. no.	City/Town	Province	Postal code

Your marital status (check one)

- Married Common-law Separated Divorced Widowed Single

Check here if this is the first time you are completing this form or if this is a change to your marital status, please attach a copy of your marriage certificate or a Statement of Spousal Relationship form (OPTrust3007)

2 Your Benefit Recipients If space on this form is insufficient, please attach a separate sheet and check here

Please see definitions on reverse. Indicate your designations by placing **check marks** in the red boxes under the "Types of Survivor Benefits" section. If **more than one individual** is identified for one type of survivor benefit, the entitlements will be **distributed equally** among them.

Eligible Spouse (common-law or married) Your eligible spouse **automatically** receives most survivor benefits. Please check the refund recipient box, if you want your spouse to receive any remaining benefits.

				Types of Survivor Benefits	
				Commuted Value to Designated Beneficiary	Refunds to any other Benefit Recipients
Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	N/A	<input type="checkbox"/>

Common-law Partner of Less than 3 Years and No Children

Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>

Date of marriage or start of common-law relationship

(DD/MM/YYYY)
 / /

Eligible Children (under 18 or over 18 if in full-time school). Your eligible children **automatically** receive some survivor benefits if you have no eligible spouse. Please check all boxes if you want your children to receive all remaining benefits.

1. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>
2. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>
3. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>
4. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>

Other Benefit Recipients (Name of person/organization/child over 18 and not in school full-time)

1. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>
2. Last name	First name and initial	SIN	Date of birth (DD/MM/YYYY)		
			/ /	<input type="checkbox"/>	<input type="checkbox"/>

3 Your Declaration

I hereby declare that the information I have provided above is true and accurate. I authorize the use of this information by the OPSEU Pension Trust for the administration of the OPSEU Pension Plan.

This form must be signed and dated before we can accept and process it.

Member Signature

Date of Signature (DD/MM/YYYY)

Definitions:

Eligible Spouse:

is one of two individuals whether of the same or opposite sex, who are married to each other **or** are living together in a conjugal, common-law or same sex relationship
(a) continuously for a period of not less than three years, or
(b) in a relationship of some permanence, if they are the natural or adoptive parents, as defined in the Family Law Act (Ontario) of a child.
You and your spouse must **not** be living separate and apart when you terminate from the Plan and at the time of your death.

Eligible Children:

Child(ren) who is: under the age of 18 **or** if over 18 years, is in continuous full-time attendance at a secondary school or post-secondary institution for up to five years following secondary school.

Excess Contribution Refund:

A refund of member contributions that may be payable along with the commuted value. If you want your spouse to receive this benefit, he/she must be selected to receive the

refund recipient survivor benefit. In the absence of a selection, this refund will be payable to your estate.

Designated Beneficiary:

If you have no eligible spouse, the person(s) named by you on this form to receive the commuted value of your pension if you die before retirement.

Refund Recipient:

The person(s) named by you on this form to receive the refund of 1x your contribution refund and any excess contribution refund payable under the Plan if the member dies before retirement. Your eligible spouse is not automatically your refund recipient.

Retirement:

A member starts receiving a pension.

Vested:

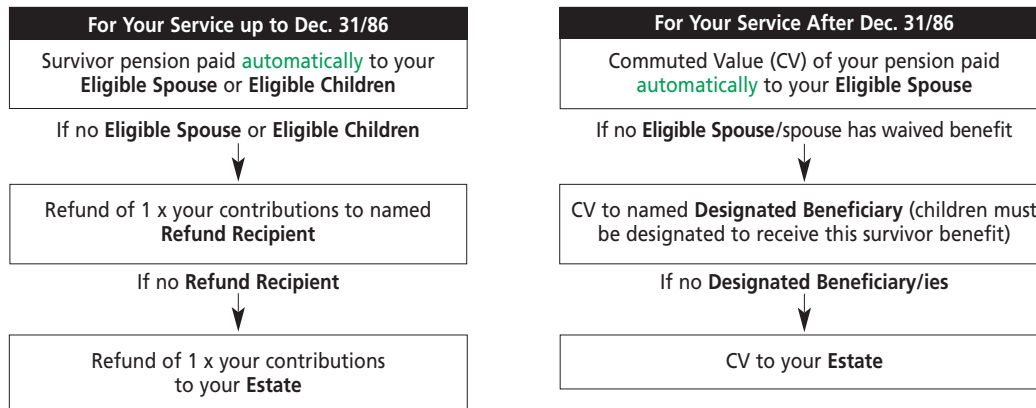
Having more than 2 years of continuous membership or credit in the Plan.

Committed Value (CV):

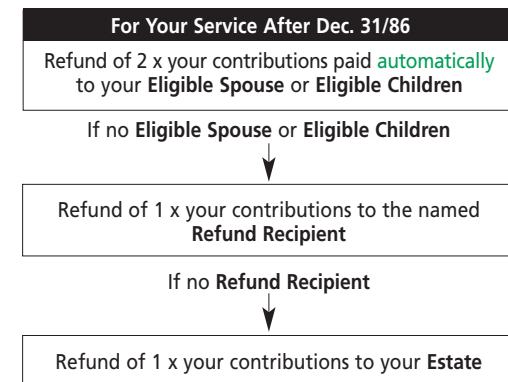
The lump-sum value of your future pension.

Explanations: Types of Survivor Benefits and Order of Payment

More than 2 Years of Credit/Membership at Death



Less than 2 Years of Credit/Membership at Death



If you would like more information please refer to the booklet "Your Pension and Your Beneficiaries" or our factsheet "Survivor Benefits and Minor Children". Both are available on our website at www.optrust.com.

Important Points About Vested Service After 1986

1. Unlike survivor benefits relating to service up to **Dec. 31/86**, survivor benefits for vested service after **Dec. 31/86** are **not automatically** payable to your children in the absence of an eligible spouse. Therefore, if you want your children to receive this survivor benefit if you die before retirement, you must select them to receive the designated beneficiary survivor benefit. To ensure that your children receive any survivor benefit from the Plan they should also be selected to receive the refund recipient survivor benefit.
2. Survivor benefits for vested service after Dec. 31/86 may be waived by your spouse in favour of designated beneficiaries.
3. An excess contribution refund is not automatically payable to your eligible spouse. If you want your spouse to receive these funds you must select your spouse to receive the refund recipient survivor benefit. See "It's Your Pension" or "Your Pension and Your Beneficiaries" booklets for more information. Both are on our Web site at www.optrust.com.

Personal information is collected on this form under the authority of Article 14.1 of the Ontario Public Service Employees' Union Pension Plan. This information will be used to determine eligibility for benefits and to document/process pension payments. Questions about this collection of information should be directed to the Director, Member and Pensioner Services, 12th floor, 1 Adelaide Street East, Toronto, Ontario M5C 3A7. Telephone 416-681-6100; toll-free within Canada 1-800-637-0024. These explanations and definitions were prepared by the OPSEU Pension Trust and provide summary and descriptive information about the OPSEU Pension Plan for convenience. The administration of the OPSEU Pension Plan remains governed by the Ontario Public Service Employees' Union Pension Plan and the provisions of the Plan prevail over this summary.