



OPSEU Pension Trust

Fiducie du régime de
retraite du SEFPO

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New Membership Pension Plan Enrolment Checklist

1. What is required for all new membership enrolments?

Documents Required

- *Enrolment Form* (OPTRUST 1005)
- *Identifying Benefit Recipients* (OPTRUST1015) form
- copy of member's proof of birth

2. Does the member have a period of service with: (1) an Employer who contributed to the OPSEU Pension Plan, Public Service Pension Plan or its predecessor (i.e. contract or unclassified/seasonal service); or (2) service with another registered plan (i.e. Service with a Non-OPS employer, OMERS, HOOPP or the Federal Government)?

Documents Required

- *Application to Purchase Credit* (OPTRUST1036) form

3. Does the member have a spouse?

Documents Required

Married

- Copy of Marriage certificate
- Copy of spouse's proof of birth
- *Statement of Spousal Relationship* (OPTRUST3007) form

Common-Law

- Copy of spouse's proof of birth
- *Statement of Spousal Relationship* (OPTRUST3007) form and 3 supporting documents (see Spousal Relationship Sheet)

4. Additional Reference Material to be provided to the Member:

- Fact sheet: *Purchasing Past Service Credit*
- Fact sheet: *Survivor benefits and Minor Children*
- Spousal Relationship Information Sheet