

# Retired Member or Surviving Spouse Change Request

If you are a **retired member**, use this form to notify the CAAT Pension Plan of a change to your personal or banking information, or your beneficiary.

- **Retired members:** Complete section A and the applicable **new** information only in sections B, C, D or E. Sign and date section F.

If you are in receipt of a **survivor pension**, use this form to notify the CAAT Pension Plan of a change to your personal or banking information.

- **Surviving spouses:** Complete section A and the applicable **new** information in section **B or C only**. **Do not complete section D or E**. Sign and date section F.

Keep this form for your records, and mail or fax a copy to the CAAT Pension Plan at the address below.

Note: Date format is dd-mmm-yyyy for all date fields

## A Retired member identification - information about the retired member that is currently on file at the CAAT Pension Plan.

Last name	First name	Initial	Date of birth	Social Insurance Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## B Change of personal information - complete if you are a retired member or surviving spouse *only* if this information has changed.

Last name	First name	Initial	Social Insurance Number	Sex (M/F)	Language preference
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> English <input type="checkbox"/> French
Mailing address			Telephone (include area code)	Effective date of address change	
<input type="text"/>			<input type="text"/>	<input type="text"/>	

## C Change of banking information - complete if you are a retired member or surviving spouse *only* if this information has changed. Attach a cheque marked "VOID."

Financial institution name	Mailing address	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank number	Transit number	Account number
<input type="text"/>	<input type="text"/>	<input type="text"/>

## D Retired members change of marital status - complete only if you are a retired member and your marital status or your spouse's information has changed.

Your spouse is the person to whom you are legally married or in a common-law relationship. For the applicable definition of spouse, refer to the definitions for each jurisdiction of employment, on the last page of this document. Your spouse may or may not be your eligible spouse for the purposes of the CAAT Plan. For more information see your most recent annual statement which describes the differences between spouse and eligible spouse or visit the CAAT Pension Plan website.

Previous marital status on file  Single  Married  Common-Law  Widowed  Divorced  Separated

Current marital status - Please update your marital status by selecting the appropriate box below:

<input type="checkbox"/> Married (please provide a copy of your marriage certificate)	<input type="checkbox"/> Common-law			
Spouse last name	Spouse first name	Sex (M/F)	Spouse date of birth	Date of marriage/Start of common-law
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

<input type="checkbox"/> Widowed	Date of death of spouse	(Please provide a copy of the Death Certificate)
<input type="text"/>	<input type="text"/>	<input type="text"/>

<input type="checkbox"/> Divorced <input type="checkbox"/> Separated	Date of divorce or separation	Note: If you have a previous spouse, a divorce or separation agreement could have an impact on the survivor benefit paid. Contact the CAAT Pension Plan if you have any questions.
<input type="text"/>	<input type="text"/>	<input type="text"/>

## E Retired member change of beneficiary - complete only if you are a retired member and your pension has been in pay for less than 60 months (or 120 months for Quebec members, if that option was chosen).

If a pension has been in pay for less than 60 months (or 120 months for Quebec members, if that option was chosen) on your date of death, the 60 months pension guarantee may provide a one time payment to your designated beneficiary providing the total pension payments received by the member and the survivor (if applicable) do not equal 60 times the initial monthly lifetime pension. Note that if you are a retired member and you have an eligible spouse on your date of death, your eligible spouse is the sole recipient of the death benefit. See the CAAT Pension Plan website for more information on survivor benefits, including benefits payable to your eligible spouse, or, if you do not have an eligible spouse, to your eligible children (see CAAT survivor benefits website for applicable definition of child). The total % Share must add up to exactly 100%. If you want to name more than three beneficiaries, please attach an additional form.

Beneficiary full name	Date of birth	Relationship	% Share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: This beneficiary designation revokes any prior beneficiary designations you may have submitted to the CAAT Pension Plan. An individual acting on behalf of a Retired Member cannot change a beneficiary designation, only the Retired Member has that authority.

## F Authorization for change

<input type="text"/>	<input type="text"/>
Retired Member or Surviving Spouse Signature	Date

# Spouse Definition by Jurisdiction

## Ontario

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Federal

The person who is married to the member or who is party to a void marriage with the member; or  
"Common-law partner": The person who is cohabiting with the member in a conjugal relationship at the relevant time, having so cohabited with the member for at least one year.

## British Columbia

1. a person who is married to the member, and who was not living separate and apart from the member for more than two years immediately prior to the relevant time; or
2. if (1) does not apply, a person who, at the relevant time, was living and cohabiting with the member in a marriage-like relationship for a period of at least two years immediately preceding the relevant time.

## Alberta

1. the person who, at the relevant time, was married to the member and has not been living separate and apart from the member for three or more consecutive years; or
2. if there is no person to whom (1) applies, the person who immediately preceding the relevant time, had lived with that other person in a conjugal relationship
  - i. for a continuous period of at least three years or,
  - ii. of some permanence, if there is a child of the relationship by birth or adoption.

## Saskatchewan

1. a person who is married to you; or
2. if you are not married, a person with whom you are cohabiting as spouses and who has been cohabiting continuously with you as your spouse for at least one year.

## Manitoba

1. a person who is married to the member; or
2. with the member, registered a common-law relationship under the Vital Statistics Act; or has been cohabiting with him or her in a conjugal relationship:
  - i. for a period of at least three years, if either of them is married; or
  - ii. for a period of at least one year, if neither of them is married.

## Quebec

1. a person who is married to or in a civil union with you;
2. if you are not married or in a civil union, a person and who has been living in a conjugal relationship with you, for a period of not less than three years, or for a period of not less than one year if:
  - i. at least one child is born, or to be born, of your union;
  - ii. you have adopted, jointly, at least one child while living together in a conjugal relationship; or
  - iii. one of you has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

The birth or adoption of a child during a marriage, civil union or conjugal relationship prior to the current period of conjugal relationship may qualify the person as a spouse.

## New Brunswick

The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who has cohabited with the member within the preceding year.

"Common-law partner": The person who is not married to the member but has cohabited with him or her in a conjugal relationship continuously for a period of at least two years, immediately before the relevant time.

## Nova Scotia

The person who

1. is married to the member or
2. is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
3. in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or, if they have ceased to cohabit, has cohabited with you within the 12-month period immediately preceding the date of entitlement; or
4. is a domestic partner within the meaning of Section 52 of the *Vital Statistics Act*; or
5. is not married to the member, but cohabiting with him or her in a conjugal relationship for:
  - i. a period of at least three years, if either of them is married; or
  - ii. a period of at least one year, if neither of them is married.

## Prince Edward Island

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Newfoundland and Labrador

"Spouse": The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or has cohabited with the member within the preceding year.

"Cohabiting partner": The person who is cohabiting or has cohabited with the member within the preceding year and has cohabited continuously with the member in a conjugal relationship for:

- i. in relation to a member who has a spouse, at least three years, provided the person is not the spouse of the member; or
- ii. in relation to a member who does not have a spouse, at least one year.