

Retirement from the BROCK UNIVERSITY PENSION PLAN

Election of Options - CHECKLIST

Ensure all completed paperwork is forwarded to Brock University at the address below

- I am taking a **Brock Pension**. I have enclosed:
- Election – Payment of Benefits at Retirement** option form completed and signed by me
 - Declaration of Marital Status** form completed and signed by me
 - VOID Cheque**
 - Proof of Age for both for member and spouse** – copy of birth certificate, passport or driver's license
 - Spousal Waiver of Joint and Survivor Pension** form completed and signed by my spouse and myself (if you are not electing a Joint & Survivor pension)
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- I am transferring my funds to a **Locked-In Retirement Account (LIRA)**. I have enclosed:
- Election – Payment of Benefits** option form completed and signed by me
 - VOID cheque** if you are receiving a lump sum cash refund
 - Declaration of Marital Status** form completed and signed by me
 - T2151** form completed by the receiving financial institution and signed by me
 - Declaration of Transfer To a Locked-In Retirement Account** form completed by the receiving financial institution and signed by me
 - Spousal Waiver of Joint and Survivor Pension** form completed and signed by my spouse and myself (*if retiree has a spouse*)
 - Proof of Age** – copy of birth certificate, passport or driver's license
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- I am transferring my funds to a **LIF**. I have enclosed:
- Election – Payment of Benefits** option form completed and signed by me
 - VOID cheque** if you are receiving a lump sum cash refund
 - Declaration of Marital Status** form completed and signed by me
 - T2151** form completed by the receiving financial institution and signed by me
 - Declaration of Transfer To a LIF** form completed by the receiving financial institution and signed by me
 - Spousal Waiver of Joint and Survivor Pension** form completed and signed by my spouse and myself (*if retiree has a spouse*)
 - Proof of Age** – copy of birth certificate, passport or driver's license
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Forms are also available on the Brock University web site: brocku.ca/human-resources/pension/#forms

Send all paperwork to:

Brock University

Attn: Pension Dept., Office of People & Culture

1812 Sir Isaac Brock Way St. Catharines, ON L2S 3A1

pension@brocku.ca

(P) 905-688-5550 x3816

(F) 905-688-8481