

Election of Options – CHECKLIST

Locked-in funds

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

- I am leaving my funds in the Brock Pension Plan. I have enclosed:
 - Election – Payment of Benefits** option form completed and signed by me

- 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 me and my spouse (*if member is over 55 and has a spouse*)
 - Proof of Age** – copy of birth certificate, passport or driver's license

- I am transferring my funds to my new employer's Registered Pension Plan. I have enclosed:
 - Election – Payment of Benefits** option form completed and signed by me
 - T2151** form completed by my new employer's pension plan and signed by me
 - A letter from my new employer's pension plan stating the funds will be administered according to the Pension Benefits Act (Ontario)
 - A letter from my new employer's pension plan stating the maximum transfer amount they will accept into their plan.
 - Declaration of Marital Status** form completed and signed by me
 - Proof of Age** - copy of birth certificate, passport or driver's license

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 x6616

(F) 905-688-8481