

Election of Options – CHECKLIST

Non-Locked in funds

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

I am transferring my funds to a **RRSP**. 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
 - Proof of Age** – copy of birth certificate, passport or driver's license
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I am electing a cash payment (subject to withholding taxes). I have enclosed:

- Election – Payment of Benefits** option form completed and signed by me
 - VOID cheque**
 - Declaration of Marital Status** form completed and signed by me
 - 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 x6616

(F) 905-688-8481