

REQUEST FOR DESIGNATION AS LIMITED MEMBER

WHEN TO USE THIS FORM

A form is used anytime a spouse's share of the benefits remains in the plan/annuity to be administered. The spouse becomes a kind of member/annuitant, with respect to the benefits, called a "limited member" and is entitled to receive a proportionate share of

- payments under a pension that just commenced,
- benefits under a defined benefit provision before pension commencement,
- disability benefits under a plan,
- annuity payments,
- benefits that are subject to an original order or agreement made before Part 6 of the *Family Law Act* came into force, and
- benefits in a defined contribution account, if the administrator consents to the spouse's proportionate share remaining in the plan.

Form P2 is used in every case for dividing benefits except where benefits in a defined contribution account are being transferred from the plan, when a Form P3 is required.

[Please print.]

To: Administrator of plan/annuity issuer

Name of plan/annuity: _____

Address of administrator/annuity issuer: _____

From: Spouse of member/annuitant

[Note: "Spouse" includes a person who has lived in a marriage-like relationship with the member/annuitant for a continuous period of at least two years and also includes a former spouse.]

Name of spouse: _____

Address: _____

Email address: _____

Telephone: (home) _____ (work) _____

Social Insurance Number: _____

Date of birth: _____

[The administrator/annuity issuer will use this information to contact you about important matters. Make sure it is accurate and that you promptly advise the administrator/annuity issuer of any changes.]

In relation to: **Plan member/annuitant**

Name of member/annuitant: _____

Address: _____

Email address: _____

Telephone: (home) _____ (work) _____

Social Insurance or Plan Identity Number: _____

Employer: _____

Other requirements:

A copy of the agreement or order dividing the benefits must be provided.

[Please attach or enclose the agreement or order with this form.]

An administrator/annuity issuer is entitled to charge a fee to register a spouse as a limited member of \$750 (or \$925 if the benefits are in a hybrid plan).

Request:

I request that _____ [name of spouse] be designated as a limited member with respect to the benefits/annuity.

The following applies to a spouse who becomes a limited member:

- for a pension, disability benefits or an annuity that is being paid, this form will also act as a request for the administrator/annuity issuer to pay the limited member his or her proportionate share of those payments;
- for benefits if the pension has not commenced, the administrator will advise the limited member about his or her options for receiving a separate pension, or, in some cases, a transfer of his or her proportionate share from the plan in a lump sum. The limited member may exercise those options by filing a Form P4;
- for benefits in a defined contribution account, the limited member will be entitled to have his or her proportionate share transferred to a separate account in the plan, if the administrator consents.

Signed:

Signed (witness to signature):

[This is normally signed by the spouse but may be signed by the member under section 113 (2) of the *Family Law Act*.]

Name of witness: _____

Address of witness: _____

Date: _____
