

Retirement Benefits Application

Member Information Section

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Seventh-day Adventist Church
Église Adventiste du Septième Jour

Retirement Plan for Canadian Employees
Plan de retraite pour les employés canadiens



The Retirement Benefits Application is comprised of the following three forms:

1. Member Information Section
2. Spousal Information Section – must be completed by **ALL** applicants whether you are married or not
3. 20 Years of Service Credit Section (if applicable)

These forms are also available in fillable PDF format on our website at www.adventist.ca/retirement. To view correctly, open in Acrobat Reader or Foxit Phantom. Opening forms in a web browser may cause fields to function incorrectly.

Current Canadian Church Employee: Complete and mail all documents to your employer **FIVE** months before your requested retirement date.

Not currently employed by the Church or employed by the Church in the USA: Complete and mail all documents to the Retirement Office at the address above **FOUR** months before your requested retirement date.

Member Information

Last Name: _____ Previous/Maiden Names: _____
First Name: _____ Middle Names: _____
Preferred First Name: _____ Social Insurance Number: _____
(Canadian)
Birth Date: _____ Social Security Number: _____
(m d y y – write out month) (USA – Provide photocopy of card)
Address: _____
City: _____ Province: _____
Postal Code: _____ Country: _____
Land Line: _____ Mobile Number: _____
Personal Email (not work email): _____

Retirement Benefits

Requested Retirement Date: _____ (must be the first day of the desired month)
(m d y y – write out month)

Please check **ONE**:

- Early Reduced Retirement (minimum 55 years of age. 0.5% per month/6% per year deducted from normal benefits for age under 65 years)
- Early Unreduced Retirement (minimum 60 years of age AND at least 95 points – age plus service credit. Must also be actively accruing service credit.)
- Normal Retirement (minimum 65 years of age)
- Age 71 Retirement (Employee is continuing employment and employee benefits but must begin pension payments as per CRA rules)

Dependent Children – unmarried dependent children younger than age 24

Name of Dependent	Birth Date	Age

Spousal Information

Retirement Benefits Application – Spousal Information Section (must be completed by **ALL** applicants)

Please complete the Retirement Benefits Application – Spousal Information Section form (not the Spousal Declaration and Beneficiary Designation form), even if you do not have a Spouse, and return it with your Retirement Benefits Application – Member Information Section. If you do not have a spouse according to the applicable pension legislation as per the definitions on the back of the form for your province of employment, you must declare so on this form.

20 Years of Service Credit

20 Years of Service Credit Form

If you were employed by the Church before January 1, 2006 and have 20 or more years of service credit (all Church service), please complete the 20 Years of Service Credit Section of the Retirement Benefits Application and return it with your Retirement Benefits Application – Member Information Section.

Proof of Age

Please provide a photocopy (clearly showing the name and date of birth) of **ONE** of the following documents: Birth Certificate, Passport or Driver's Licence

Member Member's Spouse (must provide if declaring a Spouse on the Spousal Information Section form)

USA Church Service

Please provide the following information and document copies if you have USA Church service.

Copy of Social Security Card (SSN): Member Member's Spouse (must provide if declaring a Spouse)

Copy of Medicare Card Member Member's Spouse (must provide if declaring a Spouse)

Member Certification

I certify that the information provided by me on this form is true and accurate. I understand that the information on the Retirement Benefits Application – Member Information Section and Spousal Information Section forms is being collected for the purposes of pension benefit management and administration. From time to time, the Seventh-day Adventist Church will confidentially share information with other service providers, as is necessary, for the management and administration of the pension benefits under the Plan or any successor plan. I authorize the collection, use and disclosure of such personal information for the purpose of pension benefit management and administration.

Member's Signature: _____ Date: _____