

Retirement Benefits Application

20 Years of Service Credit 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



Complete this form if **ALL** of the following apply:

1. You were employed by the Church before January 1, 2006
2. You have 20 years of service credit (all Church service)
3. You have been married at least one year before your retirement date

This information is used to determine eligibility for the Minimum Value Guarantee (MVG). The MVG is a **conditional** benefit determined separately from other pension entitlements.

Member Information

Last Name: _____ First Name: _____

Spouse's Pension Information

Has your spouse ever worked for any employer, SDA or non-SDA? No Yes

If yes, has your spouse ever earned **ANY** kind of **employer-funded** retirement benefit? No Yes

(Including but not limited to: pension/annuity, RRSPs, Canadian and USA Church Pension (USDB and USDC Plans), USA SDA Hospital Plans, Regional Conference Plan, USA 401(K), USA 403(b), USA IRA, USA Retirement Savings Account. **Excluding:** Canada Pension Plan, Old Age Security and US Social Security)

If yes, provide the monthly amount of the benefit your spouse is receiving or will receive. Also, provide the percentage amount that the employer contributed to the benefit. Example – 100% (fully employer funded), 60% (employer contributed 60% and the employee contributed 40%), etc.

Organization Providing Benefit	Percentage	Beginning Date	Monthly Benefit

If benefit is based on employer contributions to a defined contribution plan or a commuted value (lump sum) has been withdrawn from a plan, please provide the employer funded portion of the amount that was or will be received.

Organization Providing Benefit	Date Received	Employer Portion

I certify that the information provided by me on this form is true and accurate. I understand that the information on this Retirement Benefits Application – 20 Years of Service Credit form is being collected for the purposes of pension benefit management and administration. From time to time, the Seventh-day Adventist Church Retirement Plan for Canadian Employees 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: _____