



Marital/Relationship status declaration – Part A DCPP policy 88951



(You are a Part A member if you joined or were eligible to join the McGill Pension Plan prior to January 1, 2009. The Pension Plan is a hybrid plan)

Return the completed form to:

Sun Life Financial, Group Retirement Services
PO Box 6029 Station D, Montreal QC H3C 3A7
www.sunlife.ca

Nota : La version française de ce document est également disponible.

Please PRINT clearly.

1 Plan and your personal information

Name of plan sponsor McGill University			Client ID C0729	Plan 01
First name		Middle initial	Last name	
Date of birth (dd-mm-yyyy)	Social Insurance Number*	Account number		

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

2 Change of address

Address (street number and name)			Apartment or suite
City	Province	Postal code	Effective date (dd-mm-yyyy)
Email address	Telephone number (day)		Telephone number (evening)

NFC



3 Marital/Relationship status declaration (DCPP)

Member's data (please print)

Section I – Member's marital status (please print)

As of the date of this declaration (For more details about the definition of spouse, please refer to section 5)

1. a) Are you married (a person legally separated from bed and board is considered married under the Supplemental Pension Plans Act of Québec)?

☐ Yes ☐ No, go to question 2

b) Please identify the person you are married to:

Spouse's name	Date of birth (dd-mm-yyyy)	Spouse's sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
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If you answered yes and are not legally separated from bed and board, please go to Section II. In the event that you are legally separated from bed and board, please join a copy of the judgment authorizing the separation from bed and board and go to Section II.

2. a) Do you have a spouse as defined under part b) of the spouse definition?

Date (dd-mm-yyyy) <input type="checkbox"/> Yes	<input type="checkbox"/> No, go to section II
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b) Please identify your spouse:

Spouse's name	Date of birth (dd-mm-yyyy)	Spouse's sex: <input type="checkbox"/> Male <input type="checkbox"/> Female
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Section II – Member's certification

I, the undersigned, member of the above mentioned Plan, hereby certify that all the information disclosed in this form are accurate.

Signature of member X	Date signed (dd-mm-yyyy)
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Signature of witness (only required when returning your settlement form) X	Date signed (dd-mm-yyyy)
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Witness' name (please print) (only required when returning your settlement form) X

The witness is an adult who has no interest on this statement. The witness certifies the identity of the member and the authenticity of this statement.

4 Complementary note

Definition of Spouse

According to the Supplemental Pension Plans Act of Quebec, the spouse of a member is the person who, on the day of reference defined in the second paragraph:

a) is married to or in a civil union with the member;

b) has been living in a conjugal relationship with a member who is neither married nor in a civil union, whether the person is of the opposite or the same sex, for a period of not less than three years, or for a period of not less than one year if:

i) at least one child is born, or to be born, of their union;

ii) they have adopted, jointly, at least one child while living together in a conjugal relationship; or

iii) one of them has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

The spousal status is established as at either the day a member begins receiving payment of a retirement or disability pension, a pension that replaces it or a bridging benefit, or the day preceding the death of the member, whichever date is adopted by the pension plan, or, if neither is adopted, whichever date occurs first. However, where the member dies without having received any reimbursement of the accrued pension benefit other than the benefit payable upon progressive retirement, spousal status shall be established as of the day preceding the death of the member.

Notwithstanding subparagraph a) above, a person who is legally separated from bed and board on the day as of which spousal status is established is not entitled to any benefit under the plan as a spouse, unless that person is the member's successor or was named in a written notice sent by the member to the Pension plan Administrator.

For the purposes of subparagraph (b) above, the birth or adoption of a child during a marriage or civil union or a period of conjugal relationship prior to the period of conjugal relationship existing on the day as of which spousal status is established may qualify a person as a spouse.

5 Your authorization

Signature X	Date (dd-mm-yyyy)
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Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.