

**Note:** Date format is dd-mmm-yyyy for all date fields

Employer name

## A Member section - Please fill in your personal information

Last name		First name		Initial	Social Insurance Number
Date of birth	Sex (M/F)	Language preference	Email	Phone number	
		<input type="checkbox"/> English <input type="checkbox"/> French			
Mailing address					

## B Marital status - Your spouse is the person to whom you are legally married or in a common-law relationship. For the applicable definition of spouse, refer to the definitions for each jurisdiction of employment, found on the last page of this document.

☐ Single
 ☐ Married
 ☐ Common-Law

Spouse last name	Spouse first name	Sex (M/F)	Spouse date of birth	Date of marriage/ Start of common law

## C Pre-retirement death benefit and designated beneficiaries - Use this section to name your designated beneficiaries

The CAAT Pension Plan pays a pre-retirement death benefit if you die before you retire. Your designated beneficiaries can only receive the pre-retirement death benefit if you do not have an eligible spouse on the date of your death. You should name as your designated beneficiaries the person or persons who you would like to receive the pre-retirement death benefit in the event that you do not have an eligible spouse on the date of your death. If you do not have an eligible spouse on the date of your death and have not named any designated beneficiaries, the pre-retirement death benefit will be paid to your estate. Nevertheless, if you are employed in Ontario or Nova Scotia, you do not have an eligible spouse, but have eligible children on the date of your death (dependent children, under age 18), they receive a children's pension and the pre-retirement death benefit paid to your designated beneficiaries or estate will be correspondingly reduced.

The CAAT Pension Plan considers your spouse to be the eligible spouse for the pre-retirement death benefit if:

- Your spouse meets the definition based on your jurisdiction of employment (see last page of this document for applicable definition of spouse).
- Your spouse has not waived pre-retirement death benefits.

Please refer to the CAAT Plan's website ([www.caatpension.on.ca](http://www.caatpension.on.ca)) for more details on the pre-retirement death benefit, eligible spouse, and waiver. If you want to name more than three beneficiaries, please attach an additional form. The total % share should add to 100%.

Designated beneficiary full name	Date of birth	Relationship	% Share

## D Employment/membership status

Are you currently employed with another employer that participates in the CAAT Pension Plan?

☐ No
 ☐ Yes
 If yes, indicate other employer(s):
 Status at other employer
 ☐ Full-time
 ☐ OTRFT/contract

Are you already a member of the CAAT Pension Plan?

☐ No
 ☐ Yes
 If yes, indicate other employer(s):

## E Member signature

### I wish to enroll in and become a member of the CAAT Pension Plan

My membership in the Plan is subject to the Plan terms. As a member I may not opt out. During my membership, I am required to contribute to the Plan on all eligible pensionable earnings from all employment with all participating employers. If my employment ends before retirement, my membership in the Plan will continue for 24 months, which limits the payment options that may be available to me during this time. I understand that a summary of the terms of membership, including contribution rates is available on the Plan's website ([www.caatpension.on.ca](http://www.caatpension.on.ca)).

I confirm that the information provided on this form is correct. I authorize the Plan and its agents to collect, share and use my personal information as may be needed for the purposes of calculating and paying pension benefits and activities related to the administration of the Plan. Personal information is collected, used and maintained by the Plan in accordance with its privacy policy available at [www.caatpension.on.ca](http://www.caatpension.on.ca).

Member signature

Date

## F Employment information - this information is to be completed by your employer

Plan design	<input type="checkbox"/> DBplus	Employment Status	Jurisdiction of employment
Date of hire	Enrolment date	(please note that the employee must be actively employed on the date of enrolment)	Contribution rate
		Colleges only: Indicate employee group based on core position held	
		<input type="checkbox"/> Administration <input type="checkbox"/> Faculty <input type="checkbox"/> Support	
Employer HR representative (Print)		Employer HR representative signature	
Date			

# Spouse Definition by Jurisdiction

## Ontario

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Federal

The person who is married to the member or who is party to a void marriage with the member; or  
"Common-law partner": The person who is cohabiting with the member in a conjugal relationship at the relevant time, having so cohabited with the member for at least one year.

## British Columbia

1. a person who is married to the member, and who was not living separate and apart from the member for more than two years immediately prior to the relevant time; or
2. if (1) does not apply, a person who, at the relevant time, was living and cohabiting with the member in a marriage-like relationship for a period of at least two years immediately preceding the relevant time.

## Alberta

1. the person who, at the relevant time, was married to the member and has not been living separate and apart from the member for three or more consecutive years; or
2. if there is no person to whom (1) applies, the person who immediately preceding the relevant time, had lived with that other person in a conjugal relationship
  - i. for a continuous period of at least three years or,
  - ii. of some permanence, if there is a child of the relationship by birth or adoption.

## Saskatchewan

1. a person who is married to you; or
2. if you are not married, a person with whom you are cohabiting as spouses and who has been cohabiting continuously with you as your spouse for at least one year.

## Manitoba

1. a person who is married to the member; or
2. with the member, registered a common-law relationship under the Vital Statistics Act; or has been cohabiting with him or her in a conjugal relationship:
  - i. for a period of at least three years, if either of them is married; or
  - ii. for a period of at least one year, if neither of them is married.

## Quebec

1. a person who is married to or in a civil union with you;
2. if you are not married or in a civil union, a person and who has been living in a conjugal relationship with you, 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 your union;
  - ii. you have adopted, jointly, at least one child while living together in a conjugal relationship; or
  - iii. one of you has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

The birth or adoption of a child during a marriage, civil union or conjugal relationship prior to the current period of conjugal relationship may qualify the person as a spouse.

## New Brunswick

The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who has cohabited with the member within the preceding year.

"Common-law partner": The person who is not married to the member but has cohabited with him or her in a conjugal relationship continuously for a period of at least two years, immediately before the relevant time.

## Nova Scotia

The person who

1. is married to the member or
2. is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
3. in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or, if they have ceased to cohabit, has cohabited with you within the 12-month period immediately preceding the date of entitlement; or
4. is a domestic partner within the meaning of Section 52 of the *Vital Statistics Act*; or
5. is not married to the member, but cohabiting with him or her in a conjugal relationship for:
  - i. a period of at least three years, if either of them is married; or
  - ii. a period of at least one year, if neither of them is married.

## Prince Edward Island

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Newfoundland and Labrador

"Spouse": The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or has cohabited with the member within the preceding year.  
"Cohabiting partner": The person who is cohabiting or has cohabited with the member within the preceding year and has cohabited continuously with the member in a conjugal relationship for:
  - i. in relation to a member who has a spouse, at least three years, provided the person is not the spouse of the member; or
  - ii. in relation to a member who does not have a spouse, at least one year.