

Application for a Statement of Benefits in the Course of Family Mediation

Date of benefits valuation: Date of the end of the conjugal relationship

Spousal situation: Married or in a civil union, in the course of family mediation, with or without institution of an action for divorce, separation from bed and board, annulment of marriage, or dissolution or annulment of civil union.

You can use this form if:

- you are married or in a civil union;
- you and your spouse are no longer living together;
- you are using the service of a family mediator with respect to divorce, separation from bed and board or civil annulment of marriage, or dissolution or annulment of civil union; and
- you want to know the total value of the benefits accrued under a pension plan **as at the date of the end of your conjugal relationship**¹ and the value of the portion of those benefits accrued during your marriage or civil union up to that date.

Important information

You cannot use this form to **apply for a simulation** of the effects of partition of the employment earnings recorded under the Québec Pension Plan.

You must send this form to the **pension plan's administrator**, not to Retraite Québec.

You do not have to use this form to make your application; it is provided for your convenience.

You can use this form for a voluntary retirement savings plan (VRSP).

You can also use this form for a supplemental pension plan if the plan member works in Québec and the plan is subject to the *Supplemental Pension Plans Act*.

Covered plans include pension plans offered by employers in the private, municipal and university sectors and some plans in the parapublic sector, whose activities are under Québec's provincial jurisdiction. The following plans are not covered:

- public-sector pension plans administered by Retraite Québec (known as the CARRA prior to 1 January 2016);
- public and private plans under federal jurisdiction (banks, interprovincial transport and telecommunications, federal public service, etc.);
- group RRSPs.

Regardless of where a pension plan member lives, the place where he or she **works** while accruing benefits under a pension plan determines whether the Québec *Supplemental Pension Plans Act* applies. This is the case, for example, for a person who works in Québec, even if his or her pension plan is administered outside Québec or is registered with a supervisory agency outside Québec.

Instructions

This application must be sent to the **pension plan's administrator** and not to Retraite Québec. The administrator's address can be found on the statement that the plan member receives at regular intervals or you can ask the employer for the administrator's address.

Once the administrator receives this form, the statement of benefits must be sent to the member **and** his or her spouse within **60 days**.

1. If an application for divorce, separation from bed and board, annulment of marriage, or dissolution or annulment of civil union has been filed with the court and you want a valuation of the benefits accrued **as at the date of institution of the action**, that is, as at the filing date, use the form entitled *Application for a Statement of Benefits Following Institution of the Action* (RCR-137A).

Instructions (continued)

1. Information about the pension plan member

The family name, given name and home address of the pension plan **member** must be given.

If possible, you should also give the member's Social Insurance Number, employee number or any other information that will enable the plan administrator to identify him or her.

If you know the name of the pension plan, it should also be given to facilitate finding the member's account information. The name of the plan is shown on the documents that the member receives from the plan administrator.

If possible, you should also give the member's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

2. Information about the spouse

The family name, given name and home address of the pension plan **member's spouse** must be given.

If possible, you should also give the spouse's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

3. Declaration of the date on which the conjugal relationship ended

The date on which the conjugal relationship ended must be given because that date is used to calculate the value of the accrued benefits. This part of the application must be signed by both of the former spouses.

4. Mediator's declaration

A pension plan administrator is not required to provide the value of the benefits accrued as at the date of the end of the conjugal relationship unless there is pre-hearing mediation concerning a family matter (family mediation). This section of the form is a declaration that a mandate for such mediation has been given and accepted.

The mediator must be accredited by a professional order authorized to give such accreditation. A mediator may be an attorney, notary, psychologist, psychoeducator, orientation counselor, social worker, family or conjugal therapist or, in certain cases, a person employed in a youth-protection centre.

To find an accredited family mediator, you can consult the Ministère de la Justice's website, at www.justice.gouv.qc.ca, under the heading "Search for family mediator".

Your mediator must sign this section of the form. If possible, give his or her telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

5. Document to enclose

Since the requested Statement of Benefits will indicate the value of the benefits accrued during the marriage or civil union, it is essential for you to provide a document proving the date of marriage or civil union, such as a certificate of marriage issued by the Registrar of Civil Status. Any other document proving the date and acceptable to the pension plan administrator can be provided.

To obtain a marriage certificate, consult the Registrar of Civil Status's website (www.etatcivil.gouv.qc.ca).

6. Signature of the applicant

The application must be signed by the member or by his or her spouse. However, regardless of who makes the application, the Statement of Benefits will be issued in two copies. One will be sent to the plan member and the other to his or her spouse.

Please print.

1. Information about the pension plan member

Family name		Given name	
Member's identification number	Name of pension plan		
Address (number, street, apartment)			
City	Province	Country	Postal Code
Telephone			
Home	area code	Other	area code
		Extension	

2. Information about the spouse

Family name		Given name	
Address (number, street, apartment)			
City	Province	Country	Postal Code
Telephone			
Home	area code	Other	area code
		Extension	

3. Declaration of the date on which the conjugal relationship ended

We hereby declare that the date on which our conjugal relationship ended is year month day

Member's signature _____ Spouse's signature _____

4. Mediator's declaration

Given name and family name	Telephone
	area code
	Extension

I hereby declare that I am an accredited mediator and that I have received a mandate from both spouses to undertake family mediation.

Mediator's signature _____ Date year month day

5. Document to enclose (see instructions)

- Proof of the date of marriage or civil union

6. Applicant's signature

Family name	Given name
I hereby apply for a statement of the benefits accrued under the pension plan as at the date on which our conjugal relationship ended.	
Member's or spouse's signature _____	Date year month day

Do not send this form to Retraite Québec.

Send the completed form, with the required document, to the pension plan administrator.