

Application for an Optional Statement of Benefits

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

Spousal situation: Married or in a civil union, not in family mediation, with or without institution of an action for divorce, separation from bed and board or annulment of marriage, or dissolution or annulment of civil union. No procedure for dissolving a civil union before a notary.

You can use this form if:

- you are married or in a civil union;
- you and your spouse are no longer living together;
- you have not asked for the services of a family mediator with respect to divorce, separation from bed and board or civil annulment of marriage, or dissolution or annulment of a civil union;
- you are in a civil union, you have not asked for the services of a notary with respect to dissolution of a 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 accrued during your marriage or civil union up to that date.

The plan administrator does not have to issue this Statement of Benefits.

Contact the administrator before making your application to be sure that a statement will be issued. 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.

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 accumulating benefits in 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.

1. If an application for divorce, separation from bed and board or civil annulment of marriage 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

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.

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 spouses.

4. 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).

5. Signature of the member

The application must be signed by the plan member. 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 former 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 area code 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 area code Home area code Other area code Extension			

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

We want the value of the benefits accrued under the member's pension plan to be calculated as at the date of the end of our conjugal relationship.

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

Member's signature _____ **Spouse's signature** _____

4. Document to enclose (see instructions)

- Proof of the date of marriage or civil union

5. Member's signature

Family name		Given name	
I hereby apply for a statement of the benefits accrued under my pension plan as at the date of the end of our conjugal relationship. I consent to the sending of a copy of the Statement of Benefits to my spouse.			
Member'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.