

## Form 7 Spousal Waiver - Pre-Retirement Death Benefit Under a Pension Plan

► **Why complete this form?**

- You are the spouse of a member or former member of a pension plan.
- You agree to waive your right to any pre-retirement death benefit provided by Section 67 of the *Pension Benefits Act*.

**Before you complete this form**, you should have a private conversation with your own lawyer about how the completion of this form affects your individual rights.

**1 ► Give information about the pension plan**

Name of plan: \_\_\_\_\_  
\_\_\_\_\_

Registration number: \_\_\_\_\_

Name of the administrator: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Town or City: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**2 ► Give information about the member or former member**

Last name: \_\_\_\_\_ Middle name: \_\_\_\_\_

First name: \_\_\_\_\_ Date of birth (yyyy/mm/dd): \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Town or City: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**3 ► Give information about the spouse**

Last name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Town or City: \_\_\_\_\_

Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

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**4 ▶ Spouse's certification and waiver**

I **certify** that I am the spouse of \_\_\_\_\_,  
who is a member or former member of the pension plan named in this form.

I **understand** that I am entitled to receive a pre-retirement death benefit under one of the following conditions:

- my spouse dies before the payment of the deferred pension
- my spouse continues to be employed after the normal retirement date, before pension benefits are paid.

I **understand** that completing and signing this form takes away my right to receive the benefits described above. Instead, the benefit will be paid to a beneficiary designated by my spouse or to the personal representative of my spouse's estate.

I **understand** that I may cancel this waiver at any time BEFORE the date the first instalment of the pension is due.

<b>Signature of spouse:</b> _____	<b>Date (yyyy/mm/dd):</b> _____
<b>Signature of witness:</b> _____	<b>Date (yyyy/mm/dd):</b> _____

This consent must be signed before a witness who must be at least 18 years of age. They must see you sign the form above, date, and complete the Witness' Information below immediately after seeing you sign and date this form. **The witness cannot be your spouse.**

**5 ▶ Give information about the witness**

Last name: \_\_\_\_\_  
 First name: \_\_\_\_\_ Middle name: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_ Town or City: \_\_\_\_\_  
 Postal code: \_\_\_\_\_ Phone number: \_\_\_\_\_

**6 ▶ Give this waiver to the administrator of the pension plan.**

**Do not** give this waiver to the Department of Finance and Treasury Board, Pension Regulation Division

Note: This waiver comes into effect ONLY AFTER it is delivered to the administrator of the pension plan.

*It is an offence under the Criminal Code for anyone to knowingly make or use a false document with the intent that it be acted upon as genuine.*

*This form is approved by the Superintendent of Pensions under the Pension Benefits Act.*

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**How we define spouse, domestic contract, member, former member, and waiver**

**Spouse**

- The person you are married to.
- The person you are married to, if the marriage hasn't been legally ended.
- The person you thought you were married to, if you are still living together.
- The person you thought you were married to, if you have lived together within the last 12 months.
- The person you are living with as a registered domestic partner under the Vital Statistics Act.
- The person you have been living with in a conjugal relationship for at least one year, if neither of you are married to someone else.
- The person you have been living with in a conjugal relationship for at least three years, even if one or both of you are married to someone else.

**Domestic contract**

A domestic contract means

- a written agreement that provides for a division between spouses of a pension benefit, deferred pension, or pension.
- a marriage contract as defined in the Matrimonial Property Act

**Member** – member of a pension plan

**Former member** – a person who is entitled to pension benefits and

- is no longer employed by the organization that provides the pension
- is no longer a member of the pension plan

Note: A person who had the right to some pension benefits earned by a spouse and is no longer in a relationship with that spouse is NOT considered a former member.

**Waiver** – a written agreement in which a person gives up a right to something to which they would ordinarily be entitled. For example, a written agreement in which a spouse gives up the right to receive pension benefits to which they would ordinarily be entitled.