

Use this form if you were a member of either a defined benefit or defined contribution Canadian Registered Pension Plan through a former employer that does not participate in the CAAT Pension Plan, and you want to transfer your funds to purchase additional pension under DBplus. If you were a member of a defined benefit plan, to complete the purchase, your benefit with your former pension plan must be transferred to a registered retirement savings account, such as an RRSP, before you can transfer your funds to the CAAT Plan. In all cases, funds for your purchase must come from a registered retirement savings account.

This form provides the CAAT Plan with the information required to calculate the maximum you can purchase, and the amount of pension you will receive as a result of the purchase. If you have questions, contact the CAAT Pension Plan at member@caatpension.on.ca or call us at 416.673.9000 (Toll-Free 1.866.350.2228).

Step 1: Complete Section A – Member Information.

Step 2: Give this form to a representative of your previous employer/registered pension plan and have them complete section B, C and D, and return the form to you.

Step 3: Mail or fax the completed and signed form, along with your proof of age document to the CAAT Pension Plan.

- Acceptable proof of age includes any government issued identification (federal or provincial) that clearly shows the card holder's date of birth, excluding health cards (e.g. passport, birth certificate, citizenship card, driver's license).

A Member information – completed by member

Last name		First name		Initial	Social Insurance Number
Date of birth		Language preference <input type="checkbox"/> English <input type="checkbox"/> French		Current employer	Enrolment date
Email			Phone number		
Mailing address					
Member Signature				Date	

B Previous employer/registered pension plan information – Completed by previous employer or registered pension plan

Employer name		Employer pension plan (if different)		Plan registration number
Mailing address				
Date of member enrolment	Date of termination of membership		Plan type <input type="checkbox"/> defined benefit <input type="checkbox"/> defined contribution	
Has the benefit been paid out of the plan?		<input type="checkbox"/> Yes	Amount paid out: \$	Date paid out:
		<input type="checkbox"/> No		

Note: If you were a member of a defined benefit pension plan and your benefit has not been paid out of the previous plan (i.e. is still held by your former Registered Pension Plan), you will need to transfer your funds to a registered retirement savings account, such as an RRSP or LIRA, before you can purchase additional pension with the CAAT Plan.

In addition, only employment periods that occurred after 1991 can be purchased in the CAAT Plan.

C Salary information - Completed by previous employer or registered pension plan

For each calendar year of membership, indicate the employment period and the member's earnings.

Year	From (month/day)	To (month/day)	T4 earnings (excluding taxable benefits)

D Previous employer / pension plan authorization - Completed by previous employer or registered pension plan

Provide your contact information, sign and date the form.

Return the form with your sections completed to the member named in Section A.

By signing this application, you confirm that you are a representative of the employee's previous pension plan.

Date your office received this application _____

Name _____ Title _____

Phone _____ Fax _____ Email _____

Signature _____ Date _____