



DBplus Application: to become a participating employer

A. Employer information

Legal name _____ Date employer was created (dd-mm-yyyy) _____

Contact name _____ Email address _____ Phone number _____

Mailing address _____

Pension and employment laws applicable to your employees:

Federal _____ Provincial _____ Indicate provinces and/or territories _____

Province/territory of operation _____

Indicate the sector and industry class _____

B. Current plan information

If the employer has an existing retirement savings plan, indicate the type (check all that apply)

Defined Contribution Pension Plan (DC) _____ Defined Benefit Pension Plan (DB) _____

Group Registered Retirement Savings Plan (GRRSP) _____ Deferred Profit Sharing Plan (DPSP) _____

Indicate the name(s) of the existing retirement savings plan service provider(s): _____

C. Participating employee information

The information requested below is related to employees who will join, or will be eligible to join, the CAAT Pension Plan.

Number of full-time active employees _____

Number of part-time, contract employees or employees on leave _____

Please indicate eligibility to join for each of:

Full-time employees _____

Part-time, contract, or employees on leave _____

Average earnings _____

Average age _____

If employees are part of a bargaining group, please indicate the name of the group _____

Will any class(es) of employees be excluded from participating in DBplus? Yes _____ No _____

If yes, describe the class(es) of employees to be excluded _____

D. Participation start date and contribution rates

Desired start date, if known (dd-mm-yyyy) _____
 (Employers typically choose the start date to be the first day of a payroll period)

Indicate the desired contribution rate as a percentage of T4 earnings or other pensionable earnings (please choose one option).
 If you chose "other pensionable earnings" above, please provide the definition of pensionable earnings:

Please indicate the percentage of employee and employer contribution rates. The employer rate must at least match the employee rate.

Employee: _____% Employer: _____%

Check any of the following needs that apply (further discussion or additional documents required):

- Different rates for different groups of employees
- Phase-in of required contributions
- Contribution choice

E. Additional documents (may be required)

A Participation Agreement will be signed between the Employer and the CAAT Pension Plan.

The following documents may also be required:

- Financial statements
- Collective bargaining agreement (if applicable)
- Business credit report (if applicable)
- Non-disclosure agreement (if applicable)

Signature	Date (dd-mm-yyyy)
Print name and title	Telephone number (if different from above)
Email address (if different from above)	

F. Submit your application

Please submit your completed application to pension-solutions@dbplus.ca. A member of the CAAT team will be in touch about next steps.

Have questions? Please email us at pension-solutions@dbplus.ca or call:

Toll Free: 1.866.350.2228
 Toronto area: 416.673.9000