

**Members:** This form applies only to your spousal information and beneficiary designation for **your CAAT Pension Plan pre-retirement death benefits.**

Keep a copy of this form for your records, and send the completed original to the CAAT Pension Plan at the address below.

**Contact your employer if:**

- You need to update your spouse or beneficiary information for any other workplace benefits to which you may be entitled.
- You need to complete Section B and report a change of personal information (for example, your name has changed due to marriage).

Note: Date format is dd-mmm-yyyy for all date fields.

Employer name \_\_\_\_\_

**A Member identification** - information currently on file at the CAAT Pension Plan

Last name	First name	Initial	Social Insurance Number	Date of birth	Sex (M/F)
_____	_____	_____	_____	_____	_____

**B Change of personal information** - complete *only* if this information has changed

Last name	First name	Initial	Social Insurance Number	Date of birth	Sex (M/F)	Language preference
_____	_____	_____	_____	_____	_____	<input type="checkbox"/> English <input type="checkbox"/> French

**C Change of marital status** - use this section to provide information about your marital status and your spouse if applicable

Your spouse is the person to whom you are legally married or in a common-law relationship. For the applicable definition of spouse, refer to the definitions for each jurisdiction of employment, found on the last page of this document.

**Marital Status on file:**

- Single       Married       Common-law       Widowed       Divorced       Separated

**Current marital status:** Please update your marital status here

Married  Common-law      Complete this information about your eligible spouse

Spouse last name	Spouse first name	Sex (M/F)	Spouse date of birth	Date of marriage/Start of common-law
_____	_____	_____	_____	_____

Widowed      Date of death of spouse \_\_\_\_\_      Please provide a copy of the Death Certificate

Divorced       Separated      Date of divorce / separation \_\_\_\_\_      Visit our website to learn about the treatment of pensions on relationship breakdown. The Plan may require additional information from you to verify the separation or divorce.

**D Change of designated beneficiary** - use this section to name the designated beneficiaries of your CAAT Pension Plan pre-retirement death benefit

**Please note: This beneficiary designation revokes any prior beneficiary designations you may have submitted to the CAAT Pension Plan. An individual acting on behalf of a member cannot change a beneficiary designation, only the member has that authority.**

The CAAT Pension Plan pays a pre-retirement death benefit if you die before you retire. If you have an eligible spouse on the date of your death, they are the sole recipient of the pre-retirement death benefit. Your designated beneficiaries can only receive the pre-retirement death benefit if you do not have an eligible spouse on the date of your death. You should name as your designated beneficiaries the person or persons who you would like to receive the pre-retirement death benefit in the event that you do not have an eligible spouse on the date of your death.

If you do not have an eligible spouse on the date of your death and have not named any designated beneficiaries, the pre-retirement death benefit will be paid to your estate. Nevertheless, if you are employed in Ontario or Nova Scotia, you do not have an eligible spouse, but have eligible children on the date of your death, they receive a children's pension and the pre-retirement death benefit paid to your designated beneficiaries or estate will be correspondingly reduced.

The CAAT Pension Plan considers your spouse to be the eligible spouse for the pre-retirement death benefit if:

- Your spouse meets the definition based on your jurisdiction of employment (see last page of this document for applicable definition of spouse)
- Your spouse has not waived pre-retirement death benefits.

Refer to the CAAT Plan's website for more details on the pre-retirement death benefit, eligible spouse, eligible child(ren) and waiver.

Remember: the total % Share must add up to exactly 100%.

Full name	Relationship	Date of birth	% Share
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**E Member authorization**

I certify that the information provided on this form is true and correct.

_____	_____
Member signature	Date

# Spouse Definition by Jurisdiction

## Ontario

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Federal and Territories (NWT, Yukon, Nunavut)

The person who is married to the member or who is party to a void marriage with the member; or

"Common-law partner": The person who is cohabiting with the member in a conjugal relationship at the relevant time, having so cohabited with the member for at least one year.

## British Columbia

1. a person who is married to the member, and who was not living separate and apart from the member for more than two years immediately prior to the relevant time; or
2. if (1) does not apply, a person who, at the relevant time, was living and cohabiting with the member in a marriage-like relationship for a period of at least two years immediately preceding the relevant time.

## Alberta

1. the person who, at the relevant time, was married to the member and has not been living separate and apart from the member for three or more consecutive years; or
2. if there is no person to whom (1) applies, the person who immediately preceding the relevant time, had lived with that other person in a conjugal relationship
  - i. for a continuous period of at least three years or,
  - ii. of some permanence, if there is a child of the relationship by birth or adoption.

## Saskatchewan

1. a person who is married to you; or
2. if you are not married, a person with whom you are cohabiting as spouses and who has been cohabiting continuously with you as your spouse for at least one year.

## Manitoba

1. a person who is married to the member; or
2. with the member, registered a common-law relationship under the Vital Statistics Act; or has been cohabiting with him or her in a conjugal relationship:
  - i. for a period of at least three years, if either of them is married; or
  - ii. for a period of at least one year, if neither of them is married.

## Quebec

1. a person who is married to or in a civil union with you;
2. if you are not married or in a civil union, a person and who has been living in a conjugal relationship with you, for a period of not less than three years, or for a period of not less than one year if:
  - i. at least one child is born, or to be born, of your union;
  - ii. you have adopted, jointly, at least one child while living together in a conjugal relationship; or
  - iii. one of you has adopted at least one child who is the child of the other, while living together in a conjugal relationship.

The birth or adoption of a child during a marriage, civil union or conjugal relationship prior to the current period of conjugal relationship may qualify the person as a spouse.

## New Brunswick

The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who has cohabited with the member within the preceding year.

"Common-law partner": The person who is not married to the member but has cohabited with him or her in a conjugal relationship continuously for a period of at least two years, immediately before the relevant time.

## Nova Scotia

The person who

1. is married to the member or
2. is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
3. in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or, if they have ceased to cohabit, has cohabited with you within the 12-month period immediately preceding the date of entitlement; or
4. is a domestic partner within the meaning of Section 52 of the *Vital Statistics Act*; or
5. is not married to the member, but cohabiting with him or her in a conjugal relationship for:
  - i. a period of at least three years, if either of them is married; or
  - ii. a period of at least one year, if neither of them is married.

## Prince Edward Island

1. a person who is married to you and is not living separate and apart from you; or
2. a person who is not married to you and is living with you in a conjugal relationship:
  - i. continuously for a period of not less than three years; or
  - ii. in a relationship of some permanence, if you are both the parents of a Child as set out in the Children's Law Reform Act.

## Newfoundland and Labrador

"Spouse": The person who:

- a) is married to the member; or
- b) is married to the member by a marriage that is voidable and has not been annulled by a declaration of nullity; or
- c) in good faith, has gone through a form of marriage with the member that is void and who is cohabiting or has cohabited with the member within the preceding year.

"Cohabiting partner": The person who is cohabiting or has cohabited with the member within the preceding year and has cohabited continuously with the member in a conjugal relationship for:

- i. in relation to a member who has a spouse, at least three years, provided the person is not the spouse of the member; or
- ii. in relation to a member who does not have a spouse, at least one year.