



# Application to Purchase Pension Credit

## Public Service Pension Plan (PSPP)

Read our booklet, *Understanding your pension credit*, before filling out this form. Complete a separate application for any additional periods of service. **IMPORTANT:** please read page 2 for information on required supporting documents.

OPB client number

### OPB client information

OPB client last name (please print)		OPB client first name		Initials
<input type="text"/>		<input type="text"/>		<input type="text"/>
Apt. number	Street address			
<input type="text"/>	<input type="text"/>			
City	Province	Postal code	Contact telephone number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

### Service information - if exact dates are unknown, enter approximate dates.

I am applying to purchase pension credit for the following period of service:

**1. Non-contributory** - worked for a PSPP employer, but did not contribute  
Ask the employer to complete and submit a *Service Report for Buybacks* (OPB 1035)  
Period of service from (yyyy/mm/dd)      Period of service to (yyyy/mm/dd)

**2. Leave of absence** - took leave without pay for more than one month, but did not contribute for leave  
Period of service from (yyyy/mm/dd)      Period of service to (yyyy/mm/dd)

**3. Reinstatement** - was a member of the PSPP (or a predecessor plan) and received the commuted value or a refund  
Period of service from (yyyy/mm/dd)      Period of service to (yyyy/mm/dd)

**4. Non-OPS registered Canadian pension plan**  
Period of service from (yyyy/mm/dd)      Period of service to (yyyy/mm/dd)

**5. Deferred pension entitlement** - with OPSEU Pension Trust  
Period of service from (yyyy/mm/dd)      Period of service to (yyyy/mm/dd)

### Sign and date

<hr/>	Date signed (yyyy/mm/dd)
OPB client signature	<input type="text"/>



### Required supporting documents

We cannot provide a cost quote without all required supporting documents. The cost quote will be based on your salary rate on the date all information is received.

#### 1. Non-contributory service

Ask the employer you worked for during the period you wish to purchase to complete and submit a *Service Report for Buybacks* (OPB 1035).

#### 2. Leaves of absence, or 3. Reinstatement

- If you are applying to purchase a leave of absence, strike, transfer top-up, or to reinstate a period of prior membership in the PSPP where you removed your benefit from the Plan, supporting documents are already on file.
- If you are applying to reinstate a period of prior membership in the OPSEU Pension Plan where you removed your benefit from the Plan, please submit the information required under 4. *Non-OPS registered Canadian pension plan*.

#### 4. Non-OPS registered Canadian pension plan

If you are applying to purchase pension credit for a period of service where you belonged to a non-OPS registered Canadian pension plan, please obtain and submit a letter from the former employer/previous plan administrator with the following required information:

- Name and address of former employer
- Name of the pension plan and its Canada Revenue Agency registration number
- Dates of plan membership (plan enrolment and termination)  
Total credited service in years, months, and days - broken down for the following service periods:
  - a) up to December 31, 1986
  - b) from January 1, 1987 to December 31, 1991
  - c) from January 1, 1992 and after
- Dates of part-time employment, seasonal lay-off any unpaid leave of absence
- Pensionable/contributory earnings and pension adjustments for all service by calendar year for each year after December 31, 1989

#### 4. Non-OPS registered Canadian pension plans (*continued*)

- Confirmation of the entitlement paid or amount, if any, of post-1989 contributions or benefits that were transferred to an RRSP or paid in cash (total payment amount required when paid from a previous RPP)
- Confirmation that any locked-in amounts are subject to Ontario's locking-in rules. For federally regulated plans, OPB will accept funds as long as the delivering institution signs OPB's form, *Confirmation Regarding Federally Regulated Funds Transferred to the PSPP* (OPB 1098)

#### Credited service accrued prior to January 1, 1992

For any credited service accrued by the member before January 1, 1992, the former employer must provide confirmation that the funds are:

- Still in the previous employer's pension plan; and
- Available for transfer from the previous employer's pension plan to the PSPP

If you have a deferred pension with a non-OPS registered Canadian pension plan, you may have to transfer the pension benefit to purchase the pension credit. Rules vary by time period - see our booklet, *Understanding your pension credit*.

#### 5. Deferred pension entitlement with the OPSEU Pension Trust

- If you are applying **within** 24 months of joining the PSPP we will send you the applicable transfer authorization form.
- If you are applying **after** 24 months of joining the PSPP please submit the information required under 4. *Non-OPS registered Canadian pension plan*.

The personal information on this form is collected under the authority of the *Public Service Pension Act* and will be used only to administer pension benefits. For more information or if you have any questions, contact Client Services or our Privacy Officer at:

**Telephone** 416-364-5035 or **toll-free** 1-800-668-6203 (Canada & USA) / **Fax** 416-364-7578 / **www.opb.ca**