

FORM P1 (Division of Pensions Regulation, s. 4 (1)(a))

CLAIM AND REQUEST FOR INFORMATION AND NOTICE

When to Use this Form

A Form P1 is used by a spouse who is making a claim to an interest in the member's/annuitant's benefits. After this form is delivered to the administrator/annuity issuer, the spouse is entitled to receive

- information from the administrator/annuity issuer about the benefits, and
- 30 days' advance notice of changes of circumstances affecting the benefits.

[Please print]

To: Administrator of plan/annuity issuer

[Required] Name of plan/annuity _____

[Optional] Address of administrator/annuity issuer _____

From: Spouse of member/annuitant *[Note: "spouse" includes a person who has lived in a marriage-like relationship with the member/annuitant for a continuous period of at least two years and also includes a former spouse.]*

[Required] Name of spouse _____

[Required] Address _____

[If available] Email address _____

[If available] Telephone _____

Social Insurance Number _____

[The administrator/annuity issuer will use this information to contact you about important matters. Make sure it is accurate and that you promptly advise the administrator/annuity issuer of any changes.]

In relation to: Plan member/annuitant

[Required] Name of member/annuitant _____

[Optional] Address _____

[Optional] Email address _____

[Optional] Telephone _____

[At least one of the following is required] Date of Birth, Social Insurance Number, or Plan Identity Number _____

[Optional] Employer _____

Spouse's statement

I, _____ *[name of spouse]* am claiming an interest in the benefits of the member/annuitant based on section 81 of the *Family Law Act*. *[see below]*

[You are not required to authorize the administrator/annuity issuer to communicate with a representative. If you wish to authorize that communication, you must complete the following, otherwise, the administrator/annuity issuer cannot communicate with your representative.]

I authorize you to communicate with and release information to my representative(s):
[include name(s) and address(es) of representative(s)]

This authorization expires on _____ *[date]*.

Signed *(spouse)* _____

Date of Statement _____

Signed *(witness to signature of spouse)* _____

Family Law Act, section 81:

81 Subject to an agreement or order that provides otherwise and except as set out in this Part and Part 6 *[Pension Division]*,

- (a) spouses are both entitled to family property and responsible for family debt, regardless of their respective use or contribution, and
- (b) on separation, each spouse has a right to an undivided half interest in all family property as a tenant in common and is equally responsible for family debt.

Note that the administrator/annuity issuer must respect privacy in accordance with privacy legislation.