

FORM P2 (Division of Pensions Regulation, s. 4 (1)(b))

REQUEST FOR DESIGNATION AS LIMITED MEMBER

When to Use this Form

A Form P2 is used any time a spouse's share of the benefits remains in the plan/annuity to be administered. The spouse becomes a kind of member/annuitant, with respect to the benefits, called a "limited member" and is entitled to receive a proportionate share of

- payments under a pension that has commenced,
- benefits under a defined benefit provision before pension commencement,
- disability benefits under a plan,
- annuity payments,
- benefits that are subject to an original order or agreement made before Part 6 of the Family Law Act came into force, and
- benefits in a defined contribution account, if the administrator consents to the spouse's proportionate share remaining in the plan.

Form P2 is used in every case for dividing benefits except where benefits in a defined contribution account are being transferred from the plan, when a Form P3 is required.

[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 _____

[Required] Social Insurance Number _____

[Required] Date of Birth _____

[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 _____

Other requirements:

A copy of the agreement or order dividing the benefits must be provided. *[Please attach or enclose the agreement or order with this Form.]*

An administrator/annuity issuer is entitled to charge a fee to register a spouse as a limited member of \$1,000 (or \$1,200 if the benefits are in a hybrid plan).

Request:

I request that _____ *[name of spouse]* be designated as a limited member with respect to the benefits/annuity.

The following apply to a spouse who becomes a limited member:

- for a pension, disability benefits or an annuity that is being paid, this form will also act as a request for the administrator/annuity issuer to pay the limited member their proportionate share of those payments;
- for benefits if the pension has not commenced, the administrator will advise the limited member about their options for receiving a separate pension, or, in some cases, a transfer of their proportionate share from the plan in a lump sum. The limited member may exercise those options by filing a *Form P4*;
- for benefits in a defined contribution account, the limited member will be entitled to have their proportionate share transferred to a separate account in the plan, if the administrator consents.

Signed _____ *(This is normally signed by the spouse but may be signed by the member under section 113 (2) of the Family Law Act.)*

Date _____