

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

Employer \_\_\_\_\_

**Name Purchase Type (Select one):**

- Vested Prior Service:** Member previously terminated and received a commuted value payout and now wishes to purchase the service. **Complete Sections A, B, C, and E.**
- Non-vested Prior Service:** Member previously terminated and received a refund of contributions plus interest and now wishes to purchase the service. **Complete Sections A, B, C and E.**
- Unpaid Leave of Absence:** Member wishes to make the purchase more than 6 months after the end of the leave. **Complete all sections.**
- Pregnancy/Parental or Adoption Leave:** Member wishes to make the purchase more than 6 months after the end of the leave. Complete all sections of form.

**A Member section** - Completed by member.

|                 |   |               |                         |
|-----------------|---|---------------|-------------------------|
| Last name       | First name  | Initial       | Social Insurance Number |
|                 |   |               |                         |
| Date of birth   | Language preference<br><input type="checkbox"/> English <input type="checkbox"/> French | Email address | Phone number            |
|                 |   |               |                         |
| Mailing address |   |               |                         |
|                 |   |               |                         |

**B Member signature**

|                  |      |
|------------------|------|
|                  |      |
| Member Signature | Date |

**C Employment information** - Completed by current CAAT Pension Plan employer.

|                            |                                 |                |
|----------------------------|---------------------------------|----------------|
| Date of hire (dd-mmm-yyyy) | Date of enrolment (dd-mmm-yyyy) | Current salary |
|                            |                                 |                |

**D Service details** - Complete for Unpaid Leave of Absence, Pregnancy, Parental or Adoption leave purchase by CAAT Pension Plan employer where the purchasable service was earned.

Report each service period to be purchased on a separate line below. If you require more room, use page 2 to report additional periods of service.

| Current/previous employer | Year | Service start date<br>(month/day) | Service end date<br>(month/day) | Earnings |
|---------------------------|------|-----------------------------------|---------------------------------|----------|
|                           |      |                                   |                                 |          |
|                           |      |                                   |                                 |          |
|                           |      |                                   |                                 |          |
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|                           |      |                                   |                                 |          |
|                           |      |                                   |                                 |          |
|                           |      |                                   |                                 |          |

**E Employer signature**

|                                 |                                      |      |
|---------------------------------|--------------------------------------|------|
|                                 |                                      |      |
| Employer HR Representative Name | Employer HR Representative Signature | Date |





# Prior CAAT Pension Plan Service

(Includes vested prior and non-vested prior service)

**Service Purchase Timeline:** Please use this timeline as a helpful guide to complete the service purchase process.

The average time to complete this service purchase is 6-9 months. As the process is complex and there may be delays, please note that your service purchase may take longer to complete.

This process applies if you previously terminated from the CAAT Plan and transferred out the commuted value (vested), OR if you previously terminated and received a refund of your contributions plus interest (non-vested). The cost of the prior service purchase is paid by the member.

| 1   | 2   | 3  | 4   | 5   | 6  |
|---|---|--|---|---|--|
| <p><b>Initial estimate</b></p> <p>Use the ACE TOOL on the CAAT Pension Plan website for an estimate of the service purchase cost.</p> <p>The estimate will help you decide if you want to continue with the service purchase. If yes, complete the <b>Request to Purchase Service</b> application form available within the ACE Tool.</p> | <p><b>Application form</b></p> <p>Give your employer the form to complete the applicable section and return to you.</p> <p>Send the completed form to the CAAT Pension Plan.</p> <p><i>Ensure all sections of your form are complete to prevent delays.</i></p> | <p><b>Review quote from the CAAT Pension Plan</b></p> <p>The Plan will calculate the cost of your purchase and send a <b>Service Purchase Election</b> form. You can now decide if you want to purchase the service. If you decide to make the purchase, proceed to step 4.</p> <p><i>You have 90 days to have the funds transferred at the quoted cost. After this date you must begin the process again. The service is re-calculated and the cost may increase.</i></p> | <p><b>Submit Election form</b></p> <p>Send your completed <b>Service Purchase Election</b> form to the CAAT Pension Plan as soon as possible. Follow instructions on your form to determine when to send your payment.</p> <p>The Plan will submit your Past Service Pension Adjustment (PSPA) request to the Canada Revenue Agency if your election form indicated it was required. The Plan will notify you to confirm it has been approved.</p> <p><i>If a PSPA is required, we strongly recommend that you send your election form within 30 days of receiving your quote from the Plan to ensure the deadline is met. If PSPA approval is required please do not send your payment until after it is approved.</i></p> | <p><b>Payment</b></p> <p>Proceed with your service purchase payment. Ensure your payment is made prior to the deadline on your form. There are normally two options for payment:</p> <p><b>Cash</b> - submit your payment directly to the CAAT Pension Plan c/o CIBC Mellon.</p> <p><b>RRSP</b> - Complete the T2033 form that the Plan included in your package; send the form to your financial institution, and have them send the payment directly to the CAAT Pension Plan c/o CIBC Mellon.</p> <p>Your financial institution may charge fees for the transfer from an RRSP. To avoid underpayment, advise your financial institution to pay 'net of fees'.</p> <p><i>Pre-1992 service must be purchased through an RRSP Transfer.</i></p> | <p><b>Confirmation of Purchase</b></p> <p>Once the full payment has been received, the Plan will update your record and send you confirmation within 30 days.</p> <p>The service purchase will be reflected on your Annual Statement.</p> <p>If you purchased service with cash the CAAT Pension Plan will send you a tax receipt.</p> |