



# DBprime Service purchase application

## Other Than Regular Full Time Prior to Enrolment

*(including Pre-Enrolment Service on or after January 1, 2014)*

This form provides the data the CAAT Plan needs to produce a quote for the cost to purchase service earned with a CAAT Pension Plan participating employer before you became a member of the Plan. The quote cannot be processed until this form is complete. If you have questions, contact the CAAT Pension Plan at [member@caatpension.on.ca](mailto:member@caatpension.on.ca) or call us at 416.673.9000 (Toll-Free: 1.866.350.2228).

**Step 1:** Member completes Section A.

**Step 2:** Member must give this form to the CAAT Plan employer where purchasable service was earned and ask them to complete sections B, C, D (and E if this is also your current employer). The employer will return the form to the member.

**Step 3:** If the current employer is different than the employer where purchasable service was earned, the member gives the form to current CAAT Plan participating employer, and asks them to complete section E. For confidentiality, give the employer page 2 only. The employer will return the form to the member.

**Step 4:** Member mails or faxes both pages of the completed and signed form, along with **proof of age documents** to the CAAT Pension Plan. Acceptable proof of age includes any government issued identification (federal or provincial) that clearly shows the card holder's date of birth, excluding health cards (e.g. passport, birth certificate, citizenship card, driver's license).

**A Member information – Completed by member**

Last name	First name	Initial	Social Insurance Number
Language preference <input type="checkbox"/> English <input type="checkbox"/> French	Email address	Phone number	
Mailing address			
Member Signature			Date (dd-mmm-yyyy)

**B Employer information - Completed by the CAAT Plan employer where purchasable service was earned.**

**Leaves**

Did the member have any leaves during the service period that were not purchased?  YES  NO

If yes, please indicate the dates and types of leave:

Date leave started	Date leave ended	Reason for leave

**C Earnings and service information - Completed by the CAAT Plan participating employer where purchasable service was earned.**

For each calendar year of employment to be purchased, indicate the periods of service, the employment status (full-time or part-time), the Pensionable earnings, and the Pensionable service. Please report the total for each year on one line.

Year	From (month/day)	To (month/day)	Employment status		Pensionable earnings	Pensionable service (year to 5 decimals)
			Full-time	Part-time		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>		

**D Employer authorization - Completed by the CAAT Plan employer where purchasable service was earned.**

Provide your contact information, sign and date the form. If you are also the current employer of the member, complete section E below. Otherwise, return the form to the member to give to their current employer to complete section E.

Date your office received this application: \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

\_\_\_\_\_  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**E Current CAAT Plan employer information – Completed by current employer**

Current CAAT Plan employer  
\_\_\_\_\_

Member's current salary rate:  
\_\_\_\_\_

Employer Signature (sign below if current employer is different from employer where purchasable service was earned).

\_\_\_\_\_  
Employer HR Representative Name      Employer HR Representative Signature      Date



# Other Than Regular Full Time Prior to Enrolment – CAAT Service

(includes Pre-Enrolment Service on or after January 1, 2014)

**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 are purchasing any type of service with a CAAT Plan employer before you joined the Plan. The cost of this service purchase is paid by the member. Note: If you were a full time contract employee prior to January 1, 2014 refer to the Pre-Enrolment Service Purchase timeline.

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>Service purchase application</b> form available within the ACE Tool.</p>	<p><b>Step 2(a):</b> You should give the form to the employer where purchasable service was earned. They will complete the applicable section(s) and return the form to you.</p> <p><b>Step 2(b):</b> If your employer in Step 2(a) is not your current employer, give them the form to complete the applicable section and return it to you.</p> <p><b>Step 2(c):</b> You will 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>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>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>You can now proceed with the payment of your service purchase. Please ensure your payment is made prior to the deadline on your form.</p> <p>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>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>