



**Important** - Retain this Information Sheet for your records

## Information Sheet

# How to Apply for the Canada Pension Plan (CPP) Death Benefit

### Getting started

Please read this information sheet before you complete your application. The explanations match the box numbers on the application form.

Please use a **pen** to complete your application and be sure to **print** as clearly as possible.

Fill out as much of the application form as you can. If you need help, have a list of your questions ready and call us at the telephone numbers we have listed in the section called "**How to contact us**". Our lines are busiest at the beginning and end of each month, so if your business can wait, it's best to call at other times. Please have the deceased's Social Insurance Number ready.

You can also **make an appointment** with one of our service delivery agents. To do so, call us at the telephone numbers we have listed in the section called "**How to contact us**".

HOW TO CONTACT US
<p>For general information on our Programs, you can visit our Internet site at: <b>servicecanada.gc.ca</b> OR you can call</p> <p><b>In Canada or the United States, call:</b>  <b>1 800 277-9914</b> (for service in English)  <b>1 800 277-9915</b> (for service in French)  <b>1 800 255-4786</b> TTY/Teletypewriter Users Only</p>

CHECK LIST	
<b>Information/Documents You Need to Provide</b>	
Death certificate	✓
Indicate the deceased's Social Insurance Number on all documents before sending them to us (except originals)	✓
<b>If you have already provided these documents to the Canada Pension Plan or Old Age Security Program, you do not have to provide them again.</b>	

If you need to send us documents, try to send us certified photocopies instead of the original documents. This way there is no risk that your original documents will be lost in the mail. See the section titled "**Send certified photocopies instead of originals**" for more information.

### Basic eligibility factors for the Canada Pension Plan Death benefit

To qualify for a Death benefit:

- the deceased must have made enough contributions to the Canada Pension Plan;
- and**
- you must apply in writing and submit the necessary documents.

*This Information Sheet contains general information concerning the Canada Pension Plan Death benefit. The information reflects the Canada Pension Plan legislation. If there are any differences between what is in the Information Sheet and the Canada Pension Plan legislation, the legislation is always right.*

## Who should apply for the Canada Pension Plan Death benefit?

The CPP Death benefit is a one-time, lump-sum payment made to the estate of the deceased contributor.

**If there is a will**, the executor named in the will to administer the estate must apply for the Death Benefit within 60 days of the date of death.

**If there is no will**, or if the executor did not apply for the death benefit within 60 days of the date of death, one of the following persons should apply. Payment of the death benefit will be made in the following order of priority, upon application, to:

- the Administrator appointed by the Court; **or**
- the person or institution who has paid, **or** who is responsible for the payment of, the deceased's funeral expenses; **or**
- the surviving spouse or common-law partner of the deceased; **or**
- the next-of-kin of the deceased.

## Did the deceased contribute to the Quebec Pension Plan (Régime de rentes du Québec)?

A person may contribute to both the Canada Pension Plan and Quebec Pension Plan. The contributions made under both plans are combined when a benefit entitlement is calculated. If the deceased spouse or common-law partner only contributed to the Quebec Pension Plan, or if he/she contributed to both plans and resided in Quebec, or the last province of residence in Canada was Quebec at the time of death, you should contact:

La Régie des rentes du Québec  
P.O. Box 5200  
Quebec, Quebec  
G1K 7S9

## Send certified photo copies instead of original documents

With your application, you usually have to send us certain documents, such as birth certificates. If you have to send us documents, try to send us certified photocopies instead of the original documents. If you do decide to send your original documents, you may want to send them by registered mail. We will return all the original documents you send us. Keep in mind, however, that **we can only accept a photocopy if it is readable and if you have someone certify it as a true copy of the original.**

If you can bring your original documents into any Human Resources Development Canada (HRDC) office, our staff will photocopy the documents and certify them for free. If you cannot visit an HRDC office, you can ask one of the following people to certify your photocopy:

- an Accountant
- a Chiropractor
- a Commissioner of Oaths
- a Dentist
- a Doctor
- an Employee of a Federal or Provincial Department or one of its agencies
- a Funeral Director
- a Justice of the Peace
- a Lawyer
- a Magistrate
- a Manager of a Financial Institution
- a Member of a Provincial Legislature (or their staff)
- a Member of Parliament (or their staff)
- a Minister of Religion
- a Municipal Clerk
- a Notary
- an Official of a country with which Canada has a reciprocal Social Security Agreement
- an Official of an Embassy, Consulate or High Commission
- a Pharmacist
- a Police Officer
- a Postmaster
- a Professional Engineer
- a Social Worker
- a Teacher

People who certify photocopies have to compare the original document to the photocopy and provide the following information:

- state their official position or title;
- sign and print their name;
- provide their phone number; **and**
- include the date they certified the document(s).

They also have to write the following statement on the photocopy:

**This photocopy is a true copy of the original document which has not been altered in any way.**

You cannot certify photocopies of your own documents, and you cannot ask a relative to do it for you. **Please write the deceased's Social Insurance Number on all documents that you send us (except originals).**

## Filling out your application

The following information explains how to complete the application form. Where needed, explanations have been provided. These explanations match the box numbers on the application form.

If you have any questions, please call us at the telephone numbers listed in the section called "**How to contact us**".

### Section A: Information about the deceased

#### Box 1A

##### Social Insurance Number

Enter the deceased contributor's Social Insurance Number in this box.

The Death Benefit is based on how much, and for how long, the deceased contributed to the Canada Pension Plan. The deceased's earnings and contributions to the plan are kept in a "Record of Earnings" file under his/her Social Insurance Number. To make sure that we use the deceased's record of earnings, you must indicate the deceased's Social Insurance Number in question 1A.

If the deceased had more than one Social Insurance Number, please attach a note to your application, listing all numbers assigned to the deceased.

#### Box 1B

##### Date of birth

You do not need to provide proof of birth for the deceased if you provided their Social Insurance Number in the application. However, the Canada Pension Plan has the right to request proof of birth at any time, when deemed necessary.

If you did not provide the Social Insurance Number of the deceased, then you must submit a certified true copy of the deceased's original birth certificate.

If you do not have one of these documents and the deceased was born in Canada, you can obtain a copy of the deceased's birth certificate by contacting the provincial or territorial birth, marriage or death registration office in the province or territory where the deceased was born.

For people born in Canada, acceptable birth certificates are ones issued by a Provincial birth, marriage or death registration office. You can find the telephone numbers in the provincial or territorial government listings of the telephone book (usually listed as a Provincial Vital Statistics office). If you cannot get one of these documents, please call us. One of our service delivery agents will let you know what other kind of documents you can use to confirm the deceased's date of birth.

#### Box 2B

##### Date of death

You must submit proof of the deceased contributor's date of death with your application. To be accepted as proof, the document must give the name, date and place of death. The document must also be on official letterhead or contain a seal, and provide the name and/or signature of the person or authority issuing the document. The following documents may be accepted as proof of date of death.

#### ACCEPTABLE DOCUMENTS FOR PROOF OF DEATH:

- Burial or Death Certificate
- Certification of Death from another country, if an agreement on social security exists with that country
- Life or Group Insurance Claim along with a statement signed by a medical doctor
- Medical Certification of Death
- Memorandum of Notification of Death issued by the Chief of National Defence Staff
- Notarial copy of Letters of Probate
- Official Death Certificate
- Official Notification from the Public Trustee for a Province
- Registration of Death
- Statement of a medical doctor, coroner or funeral director
- Statement of Verification of Death from the Department of Veterans Affairs

### Box 3

#### Marital status at the time of death

Under the Canada Pension Plan, a Survivor's pension can be paid to the person who, **at the time of death**, was the legal spouse or common-law partner of the deceased contributor. Benefits can also be paid to the surviving children of the contributor.

If you feel this applies to you, please contact us to obtain an application for "**Canada Pension Plan Survivors pension**".

### Box 7

#### Did the deceased ever live or work in another country?

Canada has international agreements on social security with many countries. If your answer to question 7 is **yes**, you should provide us with the name of the country and the insurance number issued to the deceased by that country.

The deceased may have accumulated credits that could help qualify the estate or survivors for Canadian benefits under an international social security agreement. The deceased's Canada Pension Plan credits can also help qualify the estate or the survivors for a foreign pension. You will be advised in writing if either of the above conditions apply to the deceased.

### Box 9

#### Child Rearing Dropout Provision

This provision may help the estate qualify for the Canada Pension Plan Death benefit or increase the amount of the Death benefit. If the deceased received Family Allowances or was eligible to receive the Child Tax Benefit on behalf of any children born after December 31, 1958, obtain and complete the form titled "**Canada Pension Plan Child Rearing Dropout Provision**" and return it with your application.

#### Non-Resident Tax

If you are a non-resident of Canada for income tax purposes, we may deduct a Non-Resident Tax from the Canada Pension Plan Death benefit. The tax rate is 25% unless the country you live in has a tax treaty with Canada that reduces the rate or exempts you from paying the tax.

### Section D: Applicant's declaration

To complete the application, you have to sign and date it in this section.

### Section E: Witness's declaration

If you had someone else fill out the form for you, that person also has to sign and date it, and include their name, address, relationship to you, and telephone number in case we need to contact that person.

*It is an offence under the Canada Pension Plan legislation to make a false or misleading statement when completing your application to obtain benefits. You can be charged with an offence under the Canada Pension Plan legislation and/or the Criminal Code of Canada. Any benefits received or obtained to which you are not entitled must be repaid.*

### Other information you should read before mailing your application

#### Before you mail your application

Before you send this application form to us, please make sure that you have:

- **completed, signed and dated** your application; **and**
- *enclosed certified photocopies or any original documents we need.*

Please refer to the "**Document Check List**" at the beginning of this information sheet for the documents we need.

#### When we receive your application

Once we receive your application and any supporting documents, we will contact you if we need more information. We will send you a letter once we have completed our review to let you know if you are eligible.

If you have not heard from us by the time you expect your Death benefit, please contact us at the telephone numbers listed in the section called "**How to contact us**" at the beginning of this information sheet.

## **What you must do after you receive the Death benefit**

### **If you move**

You *must* tell us if you move. This way, we will be able to send you the tax slip you will need for income tax purposes.

<h2><b>Other pensions / benefits</b></h2>
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### **Retirement pension**

If the deceased made contributions to the Canada Pension Plan, was over the age of 70 at the time of his/her death, and had not applied for or received a Canada Pension Plan retirement pension, you should contact us and request an application. The application must be made within one year of the date of death.

### **Old Age Security pension**

If you are between the ages of 60 and 64, you may be eligible for an Allowance for the Survivor. For more information on this subject, please contact us.

### **Protection of personal information**

The information requested is required under the Canada Pension Plan (CPP). We may not be able to give you a benefit if you do not give us all the information we need. We will keep this information in the Personal Information Bank HRDC PPU 146. Your personal information is governed by the Privacy Act and we may disclose it where we are authorized to do so under the CPP.

Under the *Canada Pension Plan* and the *Privacy Act* you have the right to look at the personal information about you in your file. You can ask to see your file by contacting a Human Resources Development Canada office. To find out how to get your personal information through the Access to Information Coordinator's office, see the Info Source, a directory that lists all the information banks and the information they contain. Copies of the Info Source are available in all Human Resources Development Canada offices.

# Application for a Canada Pension Plan Death Benefit

**It is very important that you:**

- send in this form with supporting documents (see the information sheet for the documents we need); **and**
- use a **pen** and **print** as clearly as possible.

## SECTION A - INFORMATION ABOUT THE DECEASED

**DO NOT COMPLETE THE SHADED  
AREAS  
FOR OFFICE USE ONLY**

<b>1A.</b> Social Insurance Number  <input style="width: 100%;" type="text"/>	<b>1B.</b> Date of Birth Year    Month    Day  <input style="width: 100%;" type="text"/>	<b>1C.</b> Country of Birth (If born in Canada, indicate province or territory)  <input style="width: 100%;" type="text"/>	AGE ESTABLISHED  AA
<b>2A.</b> Sex  Male <input type="checkbox"/> Female <input type="checkbox"/>	<b>2B.</b> Date of Death Year    Month    Day  (See the information sheet for a list of acceptable proof of date of death documents) <input style="width: 100%;" type="text"/>		ESTABLISHED DATE OF DEATH  PROV. CODE  AA
<b>3.</b> Marital status at the time of death  (See the information sheet for important information about marital status)  Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Common-law <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/>			SURNAME - VALIDATOR  AR
<b>4A.</b> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Miss <input type="checkbox"/>	Usual First Name and Initial  <input style="width: 100%;" type="text"/>		Last Name  <input style="width: 100%;" type="text"/>
<b>4B.</b> Name at birth, if different from 4A. (e.g. maiden name, legal name change, etc.)	First Name and Initial  <input style="width: 100%;" type="text"/>	Last Name  <input style="width: 100%;" type="text"/>	
<b>4C.</b> Name on social insurance card, if different from 4A.	First Name and Initial  <input style="width: 100%;" type="text"/>	Last Name  <input style="width: 100%;" type="text"/>	
<b>5.</b> Home Address at the time of death (No., Street, Apt., R.R.)  <input style="width: 100%;" type="text"/>		City  <input style="width: 100%;" type="text"/>	
Province or Territory  <input style="width: 100%;" type="text"/>		Country other than Canada  <input style="width: 100%;" type="text"/>	Postal Code  <input style="width: 100%;" type="text"/>
<b>6A.</b> If the address shown in number 5 is outside of Canada, indicate the province or territory in which the deceased last resided.  <input style="width: 100%;" type="text"/>			<b>6B.</b> In which year did the deceased leave Canada?  <input style="width: 100%;" type="text"/>
<b>7.</b> Did the deceased ever live or work in another country?    No <input type="checkbox"/> Yes <input type="checkbox"/>			
If <b>yes</b> , indicate the names of the countries and insurance numbers. (If you need more space, use the space provided on page 4 of this application). Also, indicate whether a benefit has been requested.			
a)	Country  <input style="width: 100%;" type="text"/>	Insurance Number  <input style="width: 100%;" type="text"/>	Has a benefit been requested? Yes <input type="checkbox"/> No <input type="checkbox"/>
b)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
c)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**Deceased Contributor's Social Insurance Number**

**8A.** Did the deceased ever receive or apply for a benefit under the:

Canada Pension Plan?	Old Age Security?	Régime de rentes du Québec? (Quebec Pension Plan?)
Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>

**8B.** If **yes** to any of the above, provide the Social Insurance Number or account number.

**9.** Was the deceased or the deceased's spouse eligible to receive Family Allowances or was the deceased, the deceased's spouse or the common-law partner eligible to receive the Child Tax Benefit for any children born **after December 31, 1958**?

Deceased contributor No  Yes  Deceased's spouse or common-law partner No  Yes

**SECTION B - INFORMATION ABOUT THE SETTLEMENT OF THE ESTATE**  
(See "Who should apply for the Death benefit" on the information sheet)

**10.** Is there a will?

Yes  Please provide the name and address of the executor in number 11 and go to section C.

No  Go to number 12.

<b>FOR OFFICE USE ONLY</b>	TheEstateof	_A
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**11.** Mr.  Mrs.  First Name and Initial  Last Name

Ms.  Miss

Mailing Address (No., Street, Apt., P.O. Box, R.R.)	City	TYPE NM ADR	FOREIGN CODE	LANG.	_C
<input type="text"/>	<input type="text"/>				

Province or Territory	Country other than Canada	Postal Code	CONS. CODE	NO. LNS	A.L.	_D
<input type="text"/>	<input type="text"/>	<input type="text"/>				

**12.** There is no will and I am applying for the Death benefit as:

an administrator appointed by the court (**Please give your name and address in number 11**)

the person responsible for the funeral expenses (**You must submit the funeral contract or funeral receipts with your application.**)

the spouse or common-law partner of the deceased

the next-of-kin (Please specify your relationship)

other (Please specify)

**SECTION C - INFORMATION ABOUT THE APPLICANT**

**13.** Mr.  Mrs.  First Name and Initial  Last Name

Ms.  Miss

**14.** Relationship of applicant to the deceased

<b>FOR OFFICE USE ONLY</b>	For the Estate of	_A
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Mailing Address (No., Street, Apt., P.O. Box, R.R.)	City	TYPE NM ADR	FOREIGN CODE	LANG.	_B
<input type="text"/>	<input type="text"/>				

Province or Territory	Country other than Canada	Postal Code	CONS. CODE	NO. LNS	A.L.	_C
<input type="text"/>	<input type="text"/>	<input type="text"/>				

Deceased Contributor's Social Insurance Number

**SECTION D - APPLICANT'S DECLARATION**

I hereby apply on behalf of the estate of the deceased contributor for a Death benefit. I declare that, to the best of my knowledge, the information given in this application is true and complete.

APPLICANT'S SIGNATURE

X

APPLICATION DATE

Year Month Day

TELEPHONE NUMBER

NOTE:

We can only accept a signature with a mark (e.g. X) if a responsible person witnesses it. That person must also complete the declaration below.

**SECTION E - WITNESS'S DECLARATION**

If someone other than the applicant completed this form, that person must complete this section. If the applicant signs with a mark, a witness (friend, member of the family, etc.) must complete this section.

I have read the contents of this application to the applicant, who appeared to fully understand and who made his or her mark in my presence.

Name

Relationship to applicant

Telephone number




Address

Signature

Date Year Month Day



**FOR OFFICE USE ONLY**

**BENEFIT INFORMATION**

NUMBER OF LINES

APP. REC'D

DT. EFF.

ACTION	BNFT	AL	B/C	D	E	F	G	S	CPP NUMBER	Y	M	D	M	Y
	DTH	20		00				00						

EA

**MONETARY INFO**

CODE	CHILD SQNC	RECOVERY BNFT CHILD	SIGN	UNDER/OVPMNT	ACCRUED RECOVERY CPP	QPP	DT EFF. M Y	CPP WITHHOLD ARREARS RATE	QPP WITHHOLD ARREARS RATE
<b>TOTAL</b>									

FA

FA

FB

**FA - CTB PERIODS**

	START Y M D	END Y M D		START Y M D	END Y M D	
(1)			GB	(3)		GB
(2)			GB	(4)		GB

Application taken by: (Please print name and phone number)

Application approved pursuant to the Canada Pension Plan.

Date

Authorized Signature

DATE	TYPE OF REJECT	BATCH NO.	CYCLE	DATE	SIGNATURE
1					
2					
3					
4					



Use this space, if needed, to provide us with more information. Please indicate the question number concerned for each answer given. If you need more space, use a separate sheet of paper and attach it to this application



Service  
Canada

## Human Resources Development Canada Offices

Your form(s) should be mailed to the nearest Human Resources Development Canada (HRDC) office. These offices are shown below. If you need any help while you are completing your form(s) and you are in **Canada or the United States**, you can phone our toll-free number **1 800 277-9914**. For people with speech or hearing impairments using a teletypewriter device (TTD/TTY), call **1 800 255-4786**. Our lines are busiest at the beginning and end of each month, so if your business can wait, it's best to call at other times. Please have your social insurance number ready. **Note:** If you are applying from outside of Canada, mail your form(s) to the office in the province where you last resided.

**NEWFOUNDLAND AND LABRADOR**  
Human Resources Development Canada  
P.O. Box 9430 St. John's NL A1A 2Y5

**ONTARIO (Timmins)** Human Resources  
Development Canada  
P.O. Bag 2013 Timmins ON P4N 8C8

**PRINCE EDWARD ISLAND**  
Human Resources Development Canada  
P.O. Box 20105 Sherwood Postal Outlet  
Sherwood PE C1A 9E3

**ONTARIO (Chatham)** Human Resources  
Development Canada  
P.O. Box 2020 Chatham ON N7M 6B2

**NOVA SCOTIA** Human Resources  
Development Canada  
P.O. Box 1687 Postal Station "M" Halifax  
NS B3J 3J4

**MANITOBA AND SASKATCHEWAN**  
Human Resources Development Canada  
P.O. Box 818 Station Main Winnipeg MB  
R3C 2N4

**NEW BRUNSWICK** Human Resources  
Development Canada  
P.O. Box 250 Fredericton NB E3B 4Z6

**ALBERTA / NORTHWEST TERRITORIES  
AND NUNAVUT** Human Resources  
Development Canada  
P.O. Box 2710 Main Station Edmonton AB  
T5J 4C2

**QUEBEC** Human Resources  
Development Canada  
P.O. Box 1816 Quebec QC G1K 7L5

**BRITISH COLUMBIA AND YUKON**  
Human Resources Development Canada  
P.O. Box 1177 Victoria BC V8W 2V2

**ONTARIO (Scarborough)**  
Human Resources Development Canada  
P.O. Box 5100 Postal Station "D"  
Scarborough ON M1R 5C8

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