

Form 3

Application for a Statement of Benefits Following Institution of the Action

Date of benefits valuation: Date of institution of the action for divorce, separation from bed and board or civil annulment of marriage.

Spousal situation: Married, in family mediation or not, following application for of divorce, separation or annulment.

You can use this form if:

- you are married;
- an application for divorce, separation from bed and board or civil annulment of marriage has been filed with the Court; and
- you want to know the total value of the benefits accumulated in a pension plan **as at the date of institution of the action** (the filing date) and the value of the portion accumulated during your marriage up to that date.

If you want a valuation of the benefits **as at the date of the end of your conjugal relationship** and:

- you are in family mediation, use instead Form 1, **Application for a Statement of Benefits in the Case of Family**; or
- you are not in family mediation, use instead Form 2, **Application for an Optional Statement of Benefits**.
In this case, **first contact the plan's administrator to find out whether or not an optional statement can be issued in your case.**

Important information

You cannot use this form to **apply for a simulation** of the effects of partition of the employment earnings recorded under the Québec Pension Plan.

You must send this form to the **pension plan's administrator**, not to the Régie des rentes du Québec.

You do not have to use this form to make your application; it is provided for your convenience.

You can use this form only if the plan member works in Québec and the plan is subject to the Québec *Supplemental Pension Plans Act*.

Covered plans include pension plans offered by employers in the private and municipal sectors and some plans in the parapublic sector, whose activities are under Québec's provincial jurisdiction. The following plans are **not** covered:

- public and parapublic plans administered by the Commission administrative des régimes de retraite et d'assurances (CARRA);
- public and private plans under federal jurisdiction (banks, interprovincial transport and telecommunications, federal public service, etc.);
- group RRSPs.

Regardless of where a pension plan member lives, the place where he or she **works** while accumulating benefits in a pension plan determines whether the Québec *Supplemental Pension Plans Act* applies. This is the case, for example, for a person who works in Québec, even if his or her pension plan is administered outside Québec or is registered with a supervisory agency outside Québec.

Civil union spouses

The Québec *Supplemental Pension Plans Act* gives civil union spouses the right to obtain a statement of benefits after the institution of proceedings to dissolve or annul their civil union. However, the manner in which that right may be exercised has not yet been determined.

Form 3

Please print.

Information on the identity of the pension plan member

Family name		Given name	
Member's identification number			
Name of pension plan			
Address (number, street, apartment)			
City	Province	Country	Postal code
Telephone home	area code	other	area code extension

Information on the identity of the spouse

Family name		Given name	
Address (number, street, apartment)			
City	Province	Country	Postal code
Telephone home	area code	other	area code extension

Documents to enclose (see instructions)

- **Proof of the date of marriage**
- **Proof of the date of institution of the action for divorce, separation from bed and board or civil annulment of marriage**

Applicant's signature

I hereby apply for a statement of benefits accumulated under the pension plan as at the date of institution of the action.

Signature of the member or spouse:

Given and family name	Date year month day
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Do not send this form to the Régie des rentes du Québec.
 Send the completed form, with the required documents, to the pension plan administrator.

Instructions - Form 3

Application for a Statement of Benefits Following Institution of the Action

This application must be sent to the **pension plan's administrator** and not to the Régie des rentes du Québec. The administrator's address can be found on the statement that the plan member receives at regular intervals or you can ask the employer for the administrator's address.

Once the administrator receives this form, the statement of benefits must be sent to the member **and** his or her spouse within **60 days**.

Information on the identity of the pension plan member

The family name, given name and home address of the pension plan member must be given.

If possible, you should also give the member's social insurance number, employee number or any other information that will enable the plan administrator to identify him or her.

If you know the name of the pension plan, it should also be given to facilitate finding the member's account information. The name of the plan is shown on the documents that the member receives from the plan administrator.

If possible, you should also give the member's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

Information on the identity of the spouse

The family name, given name and home address of the pension plan member's spouse must be given.

If possible, you should also give the spouse's telephone number so that the person who processes this application can rapidly contact him or her if the need arises.

Documents to enclose

Since the requested statement of benefits will indicate the value of the benefits accumulated during the marriage, from the date of marriage up to the date of institution of the action, it is essential to enclose proof of those two dates.

A copy of the marriage certificate issued by the Registrar of Civil Status or any other document proving the date of marriage and acceptable to the pension plan administrator can be provided. To obtain a marriage certificate, consult the Registrar of Civil Status's Internet site (www.etatcivil.gouv.qc.ca), under the heading "Certificate and copy of an act".

The date of institution of the action is the date on which the application for divorce, separation from bed and board or civil annulment of marriage was filed with the Clerk of Court. A photocopy of any of the following documents can be used as proof of that date:

- a copy of the application on which the Clerk of Court has indicated the filing date;
- a certificate given by the Clerk of Court. This is a certificate that your lawyer may have had signed by the Clerk when the application was filed with the Court to institute proceedings of divorce, separation from bed and board or civil annulment of marriage;
- the docket (*plumitif*). This is a computerized Court record that gives the main elements of a hearing, including the date on which the application was filed.

Your lawyer can provide you with these documents.

Applicant's signature

The application must be signed either by the plan member or by his or her spouse. However, regardless of who makes the application, the statement of benefits will be issued in two copies. One will be sent to the plan member and the other to his or her spouse.