## ALBERTA SHEET METAL WORKERS' RETIREMENT TRUST FUND <u>Enrollment Form</u>

Please print clearly						
Name:Your first name		Your middle name		Your last name		
four ins	t name	four initiale name		four last flame		
Your Social Insurance	e Number:			<b>Gender</b> :Ma	lleFemale	
Birthdate:		_ Email Address	•			
Month	Day Year		[to be used for	r general information only –	example: newsletters]	
Address:			Phone:			
Street		City/Prov		Postal Code		
	ION: If you have a Spoune/she signs a Waiver of			-	the sole beneficiary	
I have an eligible Spo	<b>Duse</b> ~see back of this form	for definition of Spouse~	My marita	al status is:Ma	rriedCommon Law	
		Gender:				
First name of Spouse	Last name of Spouse	Male	Female	Spouse's Birthdate:	Month Day Year	
before you, he/she si If, on my death, <u>I do I</u>	TE this section to advisigns a Waiver of Entitle  not have an eligible Sp  se as a beneficiary [your sp  Last Name	ement to a Pre-Retire	ement Death y of my pens bove]. Please	n Benefit or ceases sion death benefit	to be your Spouse. is as follow;	
					%	
				<del></del>		
					% Must Total 100%	
APPOINTMENT OF TRUSTEE I appoint (print legal name of son/daughter who has not a			to receive any payments on behalf of my			
<ol> <li>Any pension death be automatically my ber</li> <li>If I do not have a Spo</li> <li>This form revokes an responsibility for any Alberta S</li> </ol>	enderstand that in the even enefit will be paid in accorn neficiary unless he/she sign ouse and have not designally y previous designation may changes of the foregoing sheet Metal Workers' Reti	rdance with the above de ins a Waiver of Entitlement ted a beneficiary above, to ade by me and I declare to by personally completing irement Trust Fund, 100-	nt to a Pre-Ret the pension de ne information g any necessar 8905 51 Aven	irement Death Benefit eath benefit will be paid oprovided as being tru y forms which may be ue NW Edmonton, AB	d to my <u>Estate</u> . e and accurate. I assum obtained from: T6E 5J3	

## **Definition of a Spouse**

**Spouse** is a person who has rights to your pension in accordance with pension legislation and who, at the relative time, is;

- a) someone that you are married to and to whom you have not been living separate and apart for 3 or more consecutive years, or
- b) if there is no person to whom subsection (a) applies, someone you have been living with in a conjugal (common-law) relationship;
  - i. for a continuous period of at least 3 years, or
  - ii. of some permanence, if there is a child of the relationship by birth or adoption.

If your Spouse wishes to waive his/her entitlement to pre-retirement death benefits, a waiver form may be obtained from the administration office and/or by accessing the website at www.absheetmetalpension.com.

## **Pension Plan Information**

This Pension Plan is administered by an Industry Joint Board of Trustees, and is registered with Canada Revenue and Alberta Employment Pensions (CRA 388603), operating in accordance with all applicable legislative requirements. A Plan summary and Membership Booklet may be obtained from the Administration office and/or by accessing the website.

## **Funeral Benefit Plan Information**

This Plan is supplemental to the Alberta Sheet Metal Workers' Retirement Trust Fund and is for the purpose of providing an enhanced death benefit. The Funeral Benefit applies to ACTIVE Plan Members and RETIRED Plan Members of the Alberta Sheet Metal Workers' Retirement Plan. The amount of the Funeral Benefit is a lump sum amount subject to a maximum benefit equal to the lessor of;

- 1. \$2,000.00 OR,
- 2. a.) for retired Plan Members, the monthly pension payable from the Retirement Plan as at date of death multiplied by six, and
  - b.) for Active Plan Members the monthly lifetime pension accrued under the Retirement Plan as of date of death, with no early reduction, multiplied by six,

however, shall not be less than \$500.00.

Minimal Plan requirements are that the claimant must apply within 3 months from date of death of the Plan Member. The Funeral Benefit shall be payable upon the death of the Plan Member to the Plan Member's Spouse or, if no spouse, to the Plan Member's Estate upon receipt of the Funeral Director's Statement or Death Certificate. This is a taxable benefit.