



Changing information (retired member/survivor)

If you are a retired OMERS member or survivor, use this form to change your information on file. Send the completed and signed form to OMERS, by mail or fax

(address and fax number on page 2). If you fax it, **do not** also mail the original.

This section must be completed

1. CURRENT INFORMATION

Social insurance number			OMERS reference number*			Birthdate (yy/mm/dd)		
Last name			First name			Middle name		
Address (street number and name)						City		
Province		Postal code		Country		Telephone number ()		
E-mail address						*Your OMERS reference number is on your <i>Annual Statement of Pension</i> .		

In this section, complete only the information that has changed

2. NEW INFORMATION

Please check the box or boxes that apply and fill in the necessary information.

Name/address change

If you receive your pension payment by direct deposit, you can also change your address by contacting OMERS Client Services at the phone number below. (We cannot accept notice of these changes by e-mail.)

Last name			First name			Middle name		
Address (street number and name)						City		
Province		Postal code		Country		Telephone number ()		
New e-mail address						Effective date —		Date (yy/mm/dd)

May we e-mail OMERS *Pension News* and plan information to you? Yes No

Banking information change

Please complete the following banking information OR enclose a void cheque. For your protection, OMERS will not accept changes to your banking information over the telephone.

Name of new bank								
Address (street number and name)					City		Province	Postal code
Transit number			Bank number			Bank account number		

Tip: Keep your old account open until the deposit actually goes into your new account, in case we don't receive your new information in time for your next monthly payment.

OMERS reference number

Tax deduction change

Please take **more** income tax off my monthly OMERS pension payment.

Amount
\$

Please take **less** income tax off my monthly OMERS pension payment.
(This option applies only if OMERS is already withholding **additional** tax.)

Amount
\$

Beneficiary change

You may designate a person, institution or your estate as a beneficiary.

- If you name more than one beneficiary, please specify the percentage you would like each to receive, or OMERS will split the refund equally.
- If one of the beneficiaries is deceased, their share would be divided among the remaining beneficiaries.

This change revokes any previous beneficiary designation you may have had on file with OMERS.

Note: only the member can change a designated beneficiary. A survivor or person with power of attorney or guardianship for property for the member cannot change a beneficiary.

Beneficiary (first, middle, and last name, or institution) – Please print	Relationship to you	% of benefit
Total:		100%

If you wish to designate more than two beneficiaries, please attach a separate sheet with the additional names.

When a member dies and there is no eligible spouse or children to receive survivor benefits, the **beneficiary** on file with OMERS may be entitled to a **residual refund**. The residual refund is equal to the member's contributions with interest **minus** any pension payments to them and/or to their survivors.

Note: after **five years** of retirement, most pension payments have exceeded the member's contributions with interest, and there is no amount left for a refund.

For definitions of terms used, please see "Survivor Benefits" in *Your Retirement Pension or Your OMERS Pension* handbook, online at www.omers.com, or contact OMERS Client Services.

OMERS must have your signature to process these changes

3. SIGNATURE

Signature	Date (yy/mm/dd)

Check the box that applies to you:

- I am the retired member or survivor.
- I hold power of attorney or guardianship for property for the retired member.
(OMERS must have proof of power of attorney or guardianship on file.)

The information on this form is part of your OMERS record and is collected, used, retained and disclosed under the authority of privacy laws and OMERS legislation.