



# Service purchase application form

## PART A: PRIVATE SECTOR EMPLOYER/PENSION PLAN

Use this form to apply for a cost to purchase service you had with a former private sector employer or private sector pension plan. If you buy back this service, it becomes credited service in the OMERS plan.

### How to use the Form 260

We recommend you first complete the *Proof of previous earnings and service* (see below). This goes to the former employer to complete and may take several weeks to be returned.

### Service purchase application form (Part A)

- Complete the member information in Section 1 and sign in Section 3.
- Ask your current OMERS employer to complete Sections 2 and 3. This confirms the annual salary rate used for your service purchase cost, as at the date of your request.

**Tip!** Keep your personal information private: do not send Part A to your former employer.

### Proof of previous earnings and service (Part B)

- Complete and sign Section 1 – *Member Information*.
- Send Part B to your former private sector employer/pension plan to complete.
- The employer is to return the completed and signed form to you.\*
- Once you have the completed forms from your current and former employers, submit them to OMERS (mail or fax; no email) along with proof of your age.\*\* Please write your OMERS membership number on all documents.
- OMERS will calculate the cost of the service and prepare an election form with your purchase options, and send it to you by mail.
- To purchase service with more than one employer, complete a separate Form 260 for each time period.

- For service with an OMERS employer or a public sector employer, use the *Form 160 – Service purchase application form, OMERS employer or public sector employer/pension plan*.

**Tip!** For a quick cost estimate, try the Buy-back Estimator in myOMERS. It draws information from your OMERS file. To register, go to [www.omers.com](http://www.omers.com), click on myOMERS, and follow the steps. (You'll need your OMERS membership number.)

Personal information is collected for pension administration purposes by OMERS under the authority of Section 35 of the *OMERS Act, 2006*. OMERS does not share your personal information with any other person other than for purposes of pension plan administration, and, by providing personal information, you consent to its use for those purposes. The collection, use, retention and destruction of personal information are subject to our Privacy Policy at [www.omers.com](http://www.omers.com).

Any questions regarding the collection of personal information should be directed to OMERS Client Services at 1-800-387-0813.

\* If your former employer is unable to complete this form, you may complete a *Form 269 – Statutory declaration for proof of service* [non-OMERS] available at [www.omers.com](http://www.omers.com).

### \*\* Proof-of-age document

A legible photocopy (*not* the original) of any **one** of these with your date of birth:

Birth certificate	Canadian driver's licence
Canadian passport	Canadian citizenship papers
Baptismal papers	Canadian registration of birth
Adoption papers	Certificate of Indian Status

## Section 1 is to be completed by the member

### 1. MEMBER INFORMATION (please complete all fields in this section)

Group number		OMERS membership number		Birthdate (m/d/y)	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Other:		Last name		First name	
Address (street number and name)		City		Province	Postal code
Daytime telephone (      )		Email		Name of current employer	
Middle name					

## Section 2 is to be completed by the current employer

### 2. SERVICE COST INFORMATION

Current annual salary rate \$
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For a member who is non-full-time or works for a school board, the salary should be annualized. Examples:

- A member earns \$27 per hour (paid vacation included). A 12-month, full-time employee in the same job class works 2080 hours per year (40-hour week). The annualized salary rate is \$56,160 (\$27 x 2080 hours).
- A 10-month school board employee (working full-time hours) has a salary rate of \$35,000. The annualized salary rate is \$42,000 (\$35,000 ÷ 10 x 12).

Type of service purchase:  Buy-back  Optional service

Employee class (for optional service only)
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OMERS membership number
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**Section 3 is to be completed by the member and current employer**

**3. AUTHORIZATION**

Member's signature	Date (m/d/y)
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The current employer's signature below is to verify the annual salary rate information.

Employer name	Contact (please print)	Title
Telephone number ( )	Fax number ( )	By providing my email address below, I authorize OMERS to contact me by email to clarify information about this member.
Signature of authorized signing officer	Date (m/d/y)	

OMERS can provide a cost only when we receive this completed and signed application form, and any necessary proof-of-service documents.



# Proof of previous earnings and service

## PART B: PRIVATE SECTOR EMPLOYER/PENSION PLAN

This form is for an OMERS Pension Plan member to apply for a cost to purchase past service with a former private sector employer or private sector pension plan.

### Instructions for the former employer/pension plan

- Please provide all of the relevant information for this OMERS member (former employee) as requested in this form.
- If there is more than one service period for this employee, please make extra copies of this form as needed.
- Once you have completed and signed this form, return it directly to the former employee.
- If you are unable to complete this form (if, for example, the former employee's records no longer exist), please advise the employee. You will be asked to provide a written statement confirming this.

Personal information is collected for pension administration purposes by OMERS under the authority of Section 35 of the *OMERS Act, 2006*. OMERS does not share a member's personal information with any other person other than for purposes of pension plan administration, and, by providing personal information, the member consents to its use for those purposes. The collection, use, retention and destruction of personal information are subject to our Privacy Policy at [www.omers.com](http://www.omers.com).

Any questions regarding the collection of personal information should be directed to OMERS Client Services at 1-800-387-0813.

### Section 1 is to be completed by the OMERS member

#### 1. MEMBER INFORMATION

Social insurance number/former employee ID number		OMERS membership number		Birthdate (m/d/y)	
<input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Ms. <input type="checkbox"/> Other:		Last name	First name	Middle name	
Address (street number and name)			City	Province	Postal code

I hereby authorize my former employer or my previous pension plan to release to OMERS any information on this form necessary to verify my earnings and service, including my social insurance number.

Member's signature	Date (m/d/y)
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### Sections 2, 3, 4 and 5 are to be completed by the former employer/pension plan

#### 2. FORMER EMPLOYER/PREVIOUS PENSION PLAN INFORMATION

Former employer/previous pension plan name					
Type of plan					
<input type="checkbox"/> Defined Benefit (DB)		<input type="checkbox"/> Defined Contribution (DC)		<input type="checkbox"/> Defined/hybrid benefit	
<input type="checkbox"/> Group RRSP/DPSP**					
Province of registration*	Registration number	Hire date (m/d/y)	Enrolment date (m/d/y)	Termination date (m/d/y)	

\* If the pension plan is registered in a province other than Ontario, OMERS may not be able to comply with the legislation. Please fax the required forms to OMERS for review, if necessary.

\*\* A group RRSP/DPSP (deferred profit sharing plan) is not a registered pension plan. If the employee was a member of a group RRSP/DPSP and no other pension plan (other than Canada Pension Plan) that service cannot be purchased in the OMERS Plan.

Is the employee still entitled to a benefit from the plan?

Yes  No – If no, indicate the benefit chosen (for example, commuted value transfer, cash refund, or other – please specify) and the period of service the benefit applied to (for example, 1982 to 1987, or 1990 to 1997).

Type of benefit chosen	Period of service it applied to	Type of benefit chosen	Period of service it applied to

#### 3. SERVICE PERIOD

Indicate any breaks in service where the employee did not receive pension service or coverage during this service period:

Date leave started (m/d/y)	Date leave ended (m/d/y)	<input type="checkbox"/> Authorized leave/legal strike	<input type="checkbox"/> Pregnancy/parental leave	<input type="checkbox"/> Layoff/suspension*	<input type="checkbox"/> Other**
Date leave started (m/d/y)	Date leave ended (m/d/y)	<input type="checkbox"/> Authorized leave/legal strike	<input type="checkbox"/> Pregnancy/parental leave	<input type="checkbox"/> Layoff/ suspension*	<input type="checkbox"/> Other**

\*Periods of layoff/suspension cannot be purchased. \*\*Other eligible types of leave: Emergency leave (as of Sep. 4/01); Family/Medical leave (as of June 29/04); Reservist leave (as of Dec. 3/07); Organ donor leave (as of June 26/09).

OMERS membership number
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**Employment status during period**

- 1.  Continuous full-time
- 2.  Non-full-time

% % of full-time hours, excluding any period each year that the employee didn't work. Example: if full-time hours were 37.5 hours per week, and the employee regularly worked 30 hours per week, the percentage of full-time hours worked would be 80% (or  $30 \div 37.5 = 0.80$ ).

Period each year the employee didn't work (generally applies to seasonal employment)

From (m/d)	To (m/d)
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- 3.  If the employee worked varying hours every year, provide the months of service worked each year

Year														
Months														

A **waiting period** is the period when an employee has to meet certain criteria before they are eligible to join the pension plan (e.g., an age requirement, a minimum period of employment or an annual enrolment date). What is **not** a waiting period is when an employee is not eligible to join the plan (e.g., some plans limited plan membership based on employment status or didn't allow temporary or part-time employees or summer students to join).

Was there any waiting period served?  No  Yes – If yes, provide dates:

Date period started (m/d/y)	Date period ended (m/d/y)
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Was the waiting period subsequently credited as service?  No  Yes

**4. SERVICE AFTER DECEMBER 31, 1989**

Please complete the information in the chart below for each year after December 31, 1989 that the employee worked with you. If you need more space, please photocopy this form.

Year	Credited service (months)	Contributory earnings	PA reported (if applicable)	PSPA reported (if applicable)

**5. FORMER EMPLOYER/PENSION PLAN AUTHORIZATION**

The former employer's/pension plan's signature below is to verify the contributory or deemed earnings and service/employment information.

Employer/pension plan name		Contact (please print)		Title	
Address (street number and name)			City	Province	Postal code
Telephone number ( )		Fax number ( )		By providing my email address below, I authorize OMERS to contact me by email to clarify information about this employee.	
Signature of authorized signing officer			Date (m/d/y)	Email	

Please return the completed form to the former employee.