



Statutory declaration for proof of service – member

FORMER EMPLOYMENT WITH A NON-OMERS EMPLOYER

Use this statutory declaration to confirm service that may be purchasable in the OMERS Primary Pension Plan, where, as a former employee, you have tried but are unable to obtain proof of your service or pension plan membership from your former employer or former registered pension plan. The glossary on page 4 has definitions of terms used in this form.

A period of past service or pension plan membership must be “pensionable” to be purchased as credited service in the OMERS Plan. That is, you worked for a Canadian public sector or private sector employer and were a member of the employer’s registered pension plan. If you were not a member of the pension plan, the period cannot be purchased in the OMERS Plan. (Other rules apply to waiting periods.)

How to use this declaration form:

- Complete sections 1 to 6. If you need more space for previous employment, service, or pension information, attach a separate sheet; include your name and OMERS membership number.

- Provide supporting documents (see definition on page 4) for the periods of plan membership in this declaration.
- Sign the completed declaration form (Section 6) in the presence of a Commissioner of Oaths. Send the original signed form and supporting documents to OMERS; do not fax this form.

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.

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

Sections 1 to 6 are 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.	Last name		First name		Middle name
<input type="checkbox"/> Other:					
Address (street number and name)			City	Province	Postal code
Daytime telephone ()		Email		Name of current employer	

2. PREVIOUS EMPLOYMENT INFORMATION

Provide details of your employment while you were a member of a registered pension plan, including waiting periods. If you have more than one period of employment information to report, please attach a separate sheet; include your name and OMERS membership number.

Employer name	Start date (m/d/y)	End date (m/d/y)
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Employment status during the period

Were you a full-time employee during the period? (See definitions of full-time and non-full-time employment on page 4.)

Yes, I was a full-time employee No, I was not a full-time employee.

If you were not a full-time employee, what percentage of full-time hours did you work, on average, during the period? %

Example: if full-time hours were 37.5 hours per week, and you regularly worked 30 hours per week, the percentage of full-time hours you worked would be 80% (or $30 \div 37.5 = 0.80$).

Was there a period during each year that you were not required to work (other than vacation or sick time)?

Example: a seasonal employee who regularly does not work during July and August.

Yes No

If yes, provide the dates of the period you didn’t work in each year. If you do not know the specific dates, provide the month and year.

From (m/d/y)	To (m/d/y)
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OMERS membership number

3. BREAKS IN SERVICE

Important! If you were not a full-time employee, OMERS must ensure that the amount of purchasable service from Section 2 is not overstated. To the best of your knowledge, please provide information on any breaks in service or absences during the employment periods.

Were there any breaks in service, absences without pay, layoffs, or terminations during the period of employment in Section 2?

Yes No

If yes, indicate the dates and the type of absence:

Start date (m/d/y)	End date (m/d/y)	Type of absence
Start date (m/d/y)	End date (m/d/y)	Type of absence
Start date (m/d/y)	End date (m/d/y)	Type of absence
Start date (m/d/y)	End date (m/d/y)	Type of absence
Start date (m/d/y)	End date (m/d/y)	Type of absence
Start date (m/d/y)	End date (m/d/y)	Type of absence

4. PREVIOUS PENSION PLAN INFORMATION

Were you a member of a registered pension plan (other than OMERS or the Canada Pension Plan) during the service period in Section 2?

Yes No

If yes, please provide the following information about the pension plan:

Name of registered pension plan	Plan registration number	Date you enrolled in the plan (m/d/y)
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Type of plan

Defined benefit (DB) Defined contribution (DC) Hybrid (combined DB/DC) Group RRSP/DPSP (see definition on page 4)

Were you required to make contributions to the plan when you were a member?

Yes No

Was there a waiting period before you could become eligible to join the pension plan?

Yes No

If yes, provide the month and year that the waiting period started

Start date (m/y)

When you left your former employer, which option did you choose for the pension you earned?

Deferred pension Cash refund Commuted value transfer to an RRSP or LIRA

5. WOUND-UP PENSION PLANS

If your former employer's registered pension plan was wound up, the plan administrator would have provided a pension wind-up options package showing your hire date, enrolment date, credited service (if applicable), and your payment options.

Was your former pension plan wound up?

Yes No

If your former pension plan was wound up, do you have a copy of the pension wind-up options documents?

Yes No

If yes, please include a copy of the pension wind-up options documents with this declaration.

OMERS membership number

Section 6 is to be signed in the presence of a Commissioner of Oaths

6. MEMBER'S DECLARATION

Please read carefully before signing this declaration in the presence of a Commissioner of Oaths.

I, (name) _____ of _____ in the Province of Ontario,
(Print name) (Print name of city)

MAKE THIS SOLEMN DECLARATION conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath by virtue of the *Canada Evidence Act*. I understand that OMERS reserves the right to request that I provide additional information to prove my previous plan membership.

I confirm that I am not able to obtain proof of my pensionable service (and applicable waiting periods) from my former employer or pension plan administrator for the periods indicated in Section 2. I further understand that should new information come to light that contradicts this Declaration, the following consequences may occur, including but not limited to:

- The buy-back cost for the period may no longer be valid;
- The ineligible credited service will be removed from my record, which would result in a lower pension entitlement;
- My early unreduced retirement date (without adjustment) may no longer be valid, due to the removal of the ineligible service purchase;
- The purchase contributions without interest, that are not permissible in the OMERS Plan will be returned as originally received (in cash or by RRSP transfer); I further understand there may be income tax implications if I have already claimed these contributions as a deduction to my taxable income;
- If my pension has already commenced, I understand I will be required to pay back the additional pension incorrectly received, including inflation increases, as a result of the ineligible service purchase.

Member's signature	Date (m/d/y)
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Section 7 is to be completed by a Commissioner of Oaths

7. COMMISSIONER OF OATHS

Declared before me at _____ country of _____,
Name of city, town or village Country
in the province or territory of _____ . Dated this _____ day of _____, _____ .
Province or territory Day Month Year

Name of Commissioner of Oaths (printed)
Signature of Commissioner of Oaths

Municipal official: please provide the office you currently hold and the municipality

Office	Municipality
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Lawyer or judge: please provide your Law Society number

Law Society number

Please affix seal/stamp here
if applicable.

If you have any questions, please contact OMERS Client Services
at 416-369-2444 or 1-800-387-0813.

Breaks in service

A break in service could be any period of absence from an employer without pay:

- where you did not contribute to the pension plan or subsequently purchase the service in that plan; or
- your employer did not provide automatic pension coverage; or
- you did not have a PA reported.

Example: a period of pregnancy/parental leave, strike, or layoff (with or without recall rights).

If a bona fide termination occurred (e.g., a contract or period of seasonal work ended), this should be reported as the end date of a period of employment.

Commissioner of Oaths

A Commissioner of Oaths can be:

- a lawyer entitled to practice law in Ontario;
- a judge or justice of the peace;
- a Notary Public;
- certain municipal officials (such as a City Clerk); or
- a person appointed as a Commissioner by the Attorney General.

Employment status

• Full-time

An employee hired as part of the permanent complement of the employer, who works full-time hours (minimum 32 hours per week, for 52 weeks of the year including vacation) as specified by the employer, is considered continuous full-time for OMERS purposes.

• Non-full-time

Any other arrangement (including an employee working full-time hours on a time-limited contract basis) is not considered continuous full-time for OMERS purposes. For these periods, provide the percentage of full-time hours worked on average during the period.

Example: if full-time hours were 37.5 hours per week, and you regularly worked 30 hours per week, the percentage of full-time hours worked would be 80% (or $30 \div 37.5 = 0.80$).

Group RRSP/DPSP (deferred profit sharing plan)

A group RRSP/DPSP is not a registered pension plan. If you were a member of a group RRSP/DPSP and no other pension plan for a period of employment (other than the Canada Pension Plan), that service cannot be purchased as credited service in the OMERS Plan.

Pension adjustment (PA)

A pension adjustment (PA) is the value of the pension benefit a member earned in the year in the employer's registered pension plan. The PA is reported annually to the Canada Revenue Agency (on the T4) and will lower the amount of RRSP room available for a member for the following year.

Pensionable service

A period of employment with an employer during which you were a member of a registered pension plan, for all or part of a calendar year.

Registered pension plan (RPP)

A pension plan that has been registered with a pension regulator in a Canadian jurisdiction (such as the Financial Services Commission of Ontario), and is also a registered plan under the *Income Tax Act* (Canada) and Regulations.

Supporting documents

OMERS requires that you submit supporting documents with the statutory declaration for the periods of pension plan membership you are declaring, as follows:

- **T4 slips:** a copy of your T4 income tax slips for each of the calendar years of the employment period. Contact Canada Revenue Agency (CRA) to request a copy of your T4s.
- **Summary of previous tax returns:** If CRA cannot provide T4s, request a summary of your previous tax returns showing the pension adjustment (PA) for each year of employment after 1989 you wish to purchase.
- **Form 160 or 260 – Service purchase application,** Part A completed by you and your current employer if you wish to apply for a cost to purchase (buy back) the service declared in this form.
- **A letter from your former employer or pension plan administrator** (if they are still in existence) confirming that they are unable to produce the service records to complete the Form 160 or Form 260.
- **Other proof-of-service documents** to be submitted if available: e.g., pension statements, pay stubs, etc.

T4 slip

The income tax form issued by your employer for reporting your taxable income during a calendar year. A T4 will show taxable income, pension adjustment (PA), a pension plan registration number, and any pension contributions made.

Waiting periods

A period of employment during which you were required by the employer's pension plan rules to wait before being permitted to join as a plan member. This could be up to two years in most jurisdictions.

Wound-up pension plan

A registered pension plan that has ceased operation, and all of its assets have been disbursed in accordance with the pension standards for the jurisdiction in which it was registered and operating. Final benefits from the plan would have been required to be paid to members at that time.