

# INSTRUCTIONS FOR COMPLETION OF ENROLLMENT FORM

## ALBERTA SCHOOL BOARDS ASSOCIATION SUPPLEMENTAL INTEGRATED PENSION PLAN (SiPP)

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1. Complete the attached form for each individual.
2. The SiPP should be offered to all members in an eligible position (as indicated in your school district's Participation Agreement).
3. Provide total earnings information for each individual for the years indicated.
4. If the member has any breaks in service between their ATRF / LAPP Date of Entry and SiPP Date of Entry, please provide a copy of the member's most recent ATRF / LAPP statement along with their enrollment form.
5. Please note that a member is ineligible to accrue service in the SiPP for periods during which they are not an active member in the ATRF / LAPP.
6. Please ensure that the member receives a copy of the employee booklet ([http://www.asba.ab.ca/wp-content/uploads/2014/07/sipp\\_member\\_booklet17.pdf](http://www.asba.ab.ca/wp-content/uploads/2014/07/sipp_member_booklet17.pdf)) within 60 days of enrollment in the Plan.
7. Send the above information to Brendan Engle, Morneau Shepell, Suite 400 – 411 Dunsmuir Street, Vancouver, BC, V6B 1X4. Original versions of the signed enrollment forms are required to be submitted by mail.

If you have any questions about completing the form please contact Brendan Engle at [bengle@morneaushepell.com](mailto:bengle@morneaushepell.com) or (604) 642-5200 ext. 4534. Morneau Shepell also provides a toll free line at 1-800-663-0790.



# ENROLLMENT FORM

## ALBERTA SCHOOL BOARDS ASSOCIATION SUPPLEMENTAL INTEGRATED PENSION PLAN (SiPP)

### Member Information:

Name: \_\_\_\_\_  
Surname First Name Initial

S.I.N.: \_\_\_\_\_ School District: \_\_\_\_\_

Gender:  Male  Female Birth Date: \_\_\_\_\_  
Day Month Year

Date of Hire: \_\_\_\_\_ SiPP Date of Entry: \_\_\_\_\_  
Day Month Year Day Month Year

ATRF Date of Entry<sup>1</sup>: \_\_\_\_\_ OR LAPP Date of Entry<sup>1</sup>: \_\_\_\_\_  
Day Month Year Day Month Year

Were there any breaks in service between the member's ATRF / LAPP Date of Entry and his/her SiPP Date of Entry?  Yes<sup>2</sup>  No

Please confirm that the member is currently an active member and accruing a benefit in the ATRF / LAPP  Confirmed

### Pension Partner Information (see next page for definition of Pension Partner):

Name: \_\_\_\_\_  
Surname First Name Initial

S.I.N. \_\_\_\_\_

Gender:  Male  Female Birth Date: \_\_\_\_\_  
Day Month Year

### Beneficiary Information:

I hereby designate, subject to any overriding legal Pension Partner's right, the following person(s) as revocable beneficiary(ies) of any monies payable under the SiPP upon my death.

|           |              |                  |
|-----------|--------------|------------------|
| _____     | _____        | _____            |
| Full Name | Relationship | % of Entitlement |
| _____     | _____        | _____            |
| Full Name | Relationship | % of Entitlement |
| _____     | _____        | _____            |
| Full Name | Relationship | % of Entitlement |

Unless specified, shares will be divided equally.

The following must be completed if any beneficiary is a minor:

\_\_\_\_\_ my \_\_\_\_\_ if living shall be and is hereby nominated  
Name Relationship

and appointed trustee to receive and disburse any monies payable hereunder to a child aforesaid during minority and any payment so made to the said trustee shall discharge the Fund Holder to the extent of such payment.

<sup>1</sup>Please note that this date may precede the Date of Hire at the School District if the member has prior ATRF / LAPP service.

<sup>2</sup>Please provide a copy of the member's most recent ATRF / LAPP statement along with the enrollment form.

**Earnings:**

Please provide annualized earnings (see page 5 of the Employer Manual for definition) on a calendar year basis. If calendar year (e.g. 2018) earnings are not available, you may provide earnings on a school year (e.g. 2017/2018) basis. If available, earnings prior to the member’s SiPP Date of Entry should also be provided.

calendar year                      or                       school year

|              |       |       |       |
|--------------|-------|-------|-------|
| Current year | _____ | _____ | _____ |
| Prior year   | _____ | _____ | _____ |
| 2 years ago  | _____ | _____ | _____ |
| 3 years ago  | _____ | _____ | _____ |
| 4 years ago  | _____ | _____ | _____ |

I hereby apply for membership in the SiPP. I understand that in the event of my death prior to the commencement of my pension, death benefits will be payable to my Pension Partner. If I do not have a Pension Partner at the date of my death, any death benefits will be payable to my designated beneficiary, or to my estate if I have not named a beneficiary.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Date

By signing this, I confirm that the member is employed in an eligible position under the school district’s ASBA SiPP Participation Agreement (“Agreement”) or, if not, the Agreement will be amended accordingly.

\_\_\_\_\_  
Signature of Employer’s Authorized Officer

\_\_\_\_\_  
Date

“Pension Partner” means,

- (a) a person who, at the relevant time, is married to the Member and has not been living separate and apart from the Member for three or more consecutive years;
- (b) if there is no person to whom subsection (a) applies, a person who has lived with the Member in a marriage-like relationship
  - (i) for a continuous period of at least 3 years preceding the date, or
  - (ii) of some permanence, if there is a child of the relationship by birth or adoption; or
- (c) if there is no person to whom subsection (a) or (b) applies, a person who otherwise qualifies as a pension partner under the terms of the LAPP or ATRF as the case may be.

There shall be only one Pension Partner for the purposes of the SiPP. A person’s qualification as a Pension Partner shall be established to the satisfaction of the ASBA SiPP Governance Board.

**The information being collected on this form is in accordance with the Freedom of Information and Personal Privacy Act and will be provided to companies contracted by ASBA to administer the SiPP.**