

Application for retirement/termination benefits – Supplemental Arrangement

Return completed form to:

UBC Faculty Pension Plan
 Pension Administration Office
 201- 2389 Health Sciences Mall, Vancouver, BC Canada V6T 1Z3

Nota : La version française de ce document est également disponible.

Please PRINT clearly.

1 Plan sponsor information

Name of plan sponsor The University of British Columbia			Client ID C0KHL	Plan 03	Contract number 97271 -G
First name	Middle initial	Last name			
Date of birth (dd-mm-yyyy)	Social Insurance Number*	Identification number			

*Your Social Insurance Number is used for administrative purposes so that information on this form is applied to your account.

2 Retirement or termination of appointment

Please check one box only.

- Retirement or termination of my appointment with the University of British Columbia is effective:
- I have not retired or terminated my appointment but reach age 71 this year.

Date (dd-mm-yyyy)

3 Settlement option

Please select one option.

Note: Although single lump sum payments can be made at any time after you have left the University, annual instalments cannot start before age 55.

I make application to receive the value of my Supplemental Arrangement account and elect the following option.

- Annual instalments (to a Maximum of 15 Years)

Date (dd-mm-yyyy)
01-

I elect _____ years of payments. Each annual instalment will be a fraction of the account for that year (i.e. year one will be 1/15th of the balance, year two will be 1/14th of the balance, etc). Note that annual instalments are payable on the first of the month.

- Lump sum payment (full value of my account) to be withdrawn

*this is the date the funds will be removed from your Supplemental Arrangement account. Payment will arrive a few days following the withdrawal date.

Date (dd-mm-yyyy)*

- Defer payment

I elect to defer payment of my account. I understand that the latest date to which I can defer is the first day of the month following my 71st birthday.

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4 Payment instructions

Payment method

Note: Tax will be withheld on payments as follows: 10% up to \$5,000; 20% up to \$15,000; and 30% exceeding \$15,000, and 25% on non-resident payments.

- Electronic fund transfer (EFT)/Direct deposit: If you are a holder of a Canadian bank account, and wish to have your pension payment directly deposited to your financial institution, please complete and attach the "Direct deposit enrolment form".
- Cheque
- Wire transfer: If you do not have a Canadian bank account, and wish to receive a wire transfer instead of a cheque, please complete and attach the "Request for benefit payment by wire" form".

Please note: Your receiving financial institution may charge a fee to accept wire transfers.

5 Your authorization

I have read and understood the options offered under the UBC Supplemental Arrangement.

I understand that I can amend or cancel this election by written notice to the University of British Columbia prior to my payment commencement date while I am still a participant in the Supplemental Arrangement, but in no event shall this election be amended or cancelled after payment has commenced.

Your signature X	Date (dd-mm-yyyy)
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Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.