

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- Lump sum payment (full value of my account) to be withdrawn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

Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service. Read our Global Privacy Statement and local policy at www.sunlife.ca/privacy or call us for a copy.

Group Retirement Services are provided by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.