

# Spousal status declaration for deceased contract owner



Locked-in funds in Ontario

## 1 Contract owner information

First name of the deceased contract owner	Middle name	Last name	Contract number
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## Spouse definition

<b>Pension Benefits Act of Ontario</b>  <b>Conditions to receive pre-retirement death benefit under a pension plan.</b>  <b>Conditions to receive survivor benefit for LIF/LRIF plan</b>	<b>Spousal status:</b>	<b>Spousal status</b> is established as of the day preceding the death of the contract owner.
	<b>Spouse:</b>	The <b>spouse</b> of a contract owner, means on the day of reference under consideration, the person who: (a) is married to the contract owner, or (b) is not married to the contract owner but is and has been living with the contract owner in a conjugal relationship, (i) continuously for a period of not less than three years, or (ii) in a relationship of some permanence if the person and the contract owner are the natural or adoptive parents of a child, both as defined in the Family Law Act.  A spouse is not entitled to receive a pre-retirement death benefit where the contract owner or former owner and his or her spouse are living separate and apart on the date of the death of the contract owner or former owner.  A spouse living separate and apart from the owner on the date of the owner's death is not entitled to receive the value of the assets in the fund.

## 2 Claimant's statement

I have read and fully understand the definition of spouse and the conditions to receive a pre-retirement or survivor death benefit for pension plans or LIF/LRIF as set out above. I confirm that,

**Please check one box only:**

- at the contract owner's date of death, I fulfilled the conditions required to be considered the contract owner's spouse for the purpose of entitlement to the death benefit or the survivor benefits as applicable.
- at the contract owner's date of death, I was the designated beneficiary and to the best of my knowledge, no person fulfilled the conditions required to be considered the contract owner's spouse.
- at the contract owner's date of death, I was, and continue to be, the executor/liquidator and, to the best of my knowledge, no person fulfilled the conditions required to be considered the contract owner's spouse or has been designated as a beneficiary.

I, the undersigned claimant, certify that the above statements are true, correct and complete to the best of my knowledge. I recognize that a false declaration could result in legal procedures against me.

Signature of claimant <b>X</b>		Date (dd-mm-yyyy) — —	
First name (please print)	Last name (please print)		Date of birth (dd-mm-yyyy) — —
Resident address (street number and name)		Apartment or suite	Telephone number — —
City	Province/state	Country	Postal code/ZIP