



DECLARATION OF MARITAL STATUS

Canada Post Corporation Registered Pension Plan (the Plan)

Important: Before completing this form please read the “Declaration of Marital Status Information Sheet” included with this form, to fully understand how to complete it and the meaning of the terms used. All italicized terms are defined in the information sheet.

Please complete all sections. Provide all appropriate details and put a checkmark (✓) in the box(es) that apply to you.

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|--|----------------|--|------------------|--|
| 1. Plan Member Information | | | | |
| Last name | | Given name | | |
| Employee no. | Street address | | | |
| City | Province | Postal code | Telephone number | |
| 2. Declaration of Current Marital Status | | | | |
| Indicate your current marital status (check one box only) | | | | |
| <input type="checkbox"/> Single | | <input type="checkbox"/> Separated | | |
| <input type="checkbox"/> Common-law | | As of (mm/dd/yyyy) _____ | | |
| <input type="checkbox"/> Married | | <input type="checkbox"/> Divorced | | |
| <input type="checkbox"/> Widowed | | As of (mm/dd/yyyy) _____ | | |
| As of (mm/dd/yyyy) _____ | | As of (mm/dd/yyyy) _____ | | |
| Name of deceased _____ | | | | |
| Note: You must submit a Death Certificate. | | | | |
| Name of your current Spouse/Common-law Partner | | | | |
| Date of marriage/start of common-law relationship (mm/dd/yyyy) | | Date of birth of current Spouse/Common-law Partner (mm/dd/yyyy) | | |
| You must declare all former Spouse(s) and former Common-law Partner(s). | | | | |
| Have you previously been married or been in a common-law relationship? | | | | |
| <input type="checkbox"/> Yes. Go to section 3. | | | | |
| <input type="checkbox"/> No. Go to section 4. | | | | |
| 3. Declaration of Former Spouse or Common-law Partner | | | | |
| Name of former Spouse/former Common-law Partner | | Date of birth of former Spouse/former Common-law Partner | | |
| Date of marriage/start of common-law relationship | | Relationship end date | | |
| Relationship with person indicated in section 3 ended due to | | <input type="checkbox"/> 4-Separation/Divorce, and former Spouse/former Common-law Partner is deceased | | |
| <input type="checkbox"/> 1-Separation (if you were common-law) | | Date of Death (mm/dd/yyyy) _____ | | |
| <input type="checkbox"/> 2-Separation, but not divorce (if you were married) | | Name of deceased _____ | | |
| <input type="checkbox"/> 3-Divorce | | <input type="checkbox"/> 5-Death | | |
| Please ensure to also complete the top portion of page 2. | | Date of Death (mm/dd/yyyy) _____ | | |
| | | Name of deceased _____ | | |
| <input type="checkbox"/> I have more than one former Spouse/former Common-law Partner. I have attached a sheet that provides the details regarding this person, as requested in section 3 above. | | | | |

Use this space to add any additional information that you think may be of importance and that we should be informed of, if needed.

Note 1: If you checked any of the boxes 1, 2, 3 or 4 above, you must provide all documentation that addresses the division of your pension.

Note 2: In addition, if you checked boxes 2, 3 or 4, you must supply the legal document(s) that prove that the relationship is terminated.

Note 3: If you checked boxes 4 or 5, you must submit a Death Certificate.

See information sheet for more details.

As per the final Separation Agreement or final registered Court Order which should address the division of my pension, I declare that my former *Spouse/Common-law Partner* indicated in section 3 above is:

- entitled to all or a portion of my pension, or is
 not entitled to all or a portion of my pension.

In addition I have enclosed or will forward to the Canada Post Pension Centre:

- a certified* copy of the entire final registered Court Order, or
 a copy of the entire final valid Separation Agreement, and
 any approved/incorporated agreements that provide information on the distribution of my pension, or
 there were no Separation Agreement or Court Order produced after my relationship ended.
 ➔ **You must call the Canada Post Pension Centre as you will be required to submit a sworn Affidavit**, or**
 the Separation Agreement or Court Order produced after my relationship ended cannot be located.
 ➔ **For a Court Order, you must obtain copies of the documents from the Court/or your lawyer.**
 ➔ **For a Separation Agreement filed with the Court, you must obtain copies of the documents from the Court/or lawyer.**
 ➔ **For a Separation Agreement not filed with the Court, call the Canada Post Pension Centre to submit a sworn Affidavit.**

* Certified: a copy of the entire final registered Court Order which was certified as a true copy by someone such as a notary public or a commissioner of oath

** Affidavit: See information sheet for more details

4. Signature

I understand that this form replaces any previous *Declaration of Marital Status* form that I may have completed for the purposes of the Plan.

I hereby certify that I have carefully reviewed the information contained in this form and in the included information sheet and make this solemn declaration that the information given on this form is, to the best of my knowledge, correct and complete.

I understand the witness to my signature must be someone other than my current or former *Spouse or Common-law Partner*.

Member signature

Date member signed (mm/dd/yyyy)

Witness signature

Date witness signed (mm/dd/yyyy)

Witness name (print complete name)

Witness telephone number

This completed, signed and witnessed form is to be returned to:

**Canada Post Pension Centre
 PO Box 9104 Stn Main
 Concord ON L4K 0R3**

Declaration of Marital Status Information Sheet

The completion of this form is **mandatory** and care should be taken when completing it. The information you provide on this form is required before your pension benefit can be processed and **will be used to determine your survivor in the event of your death.**

Purpose of this form

The Declaration of Marital Status form is used to declare your current marital status and provide information regarding all your current and former *Spouse(s)* and *Common-law Partner(s)*, if any. The form helps the Canada Post Pension Centre determine which documents or forms may be required. Also, as the Plan administrator, the Canada Post Pension Centre has a fiduciary duty towards the Plan and all individuals with rights under the Plan.

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| <p>The <i>Pension Benefits Standards Act, 1985</i> (the PBSA), provides that a member's pension must be in the form of a joint and survivor benefit, if he/she has a <i>Spouse</i> or <i>Common-law Partner</i> at the time the pension benefit commences to be paid.</p> | <p>→ Therefore, the Plan administrator has the obligation to diligently inquire as to the member's marital status at the time of pension commencement and to require proof that any former relationship(s) have legally ended.</p> |
| <p>In addition, the PBSA entitles the former <i>Spouse</i> or <i>Common-law Partner</i> to be assigned all or part of a member's pension, upon divorce, annulment, separation or breakdown of a <i>Common-law Partner</i> relationship.</p> | <p>→ Therefore, the Plan administrator also has a fiduciary duty to diligently inquire as to whether or not there is an order or agreement dividing the member's pension before commencing any payment of pension benefits. The Plan administrator must require all members to supply all documents that may provide for the division of the member's pension.</p> |
| <p>The proof required is documentation such as: all Separation Agreements, Court Orders, Divorce Orders and Judgments, including any approved/incorporated agreements.</p> | |

Plan Definitions

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| <p><i>Spouse:</i></p> | <p>means a person who is married to you or is party to a void or null marriage with you. This includes a spouse from whom you are separated, but not legally divorced. If you have a Spouse from whom you are separated and a Common-law Partner with whom you are cohabiting, a reference to Spouse or Common-law Partner means your Common-law Partner.</p> <p>A void marriage is one that is not, or never was, recognized as a legal union.</p> |
| <p><i>Common-law Partner:</i></p> | <p>means a person who is cohabiting with you in a conjugal relationship, having so cohabited for a period of at least one year.</p> |

Marital Status Definitions

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|--------------------|--|
| <p>Single:</p> | <p>You have never been married and are not, and, have never been, in a common-law relationship.</p> |
| <p>Common-law:</p> | <p>You have lived continuously with your partner in a marital-type relationship for a minimum of one year.</p> |
| <p>Married:</p> | <p>You and your spouse have had a ceremony that legally binds you to each other. Your marriage must be legally recognized in the country where it was performed and in Canada.</p> |
| <p>Separated:</p> | <p>You are married, but no longer living with your <i>Spouse</i>, or, you were in a common-law relationship, and are no longer living with your <i>Common-law Partner</i>.</p> |
| <p>Divorced:</p> | <p>You have legally ended your marriage and have obtained a judgment of divorce.</p> |
| <p>Widowed:</p> | <p>Your spouse has died and that you have not re-married or entered into a common-law relationship.</p> |

¹ - Canada Revenue Agency

² - Office of the Superintendent of Financial Institutions

More Details on Section 3 of the form

(Some items indicated in Note 1, Note 2 and Note 3 may end up being the same document(s), depending on your situation.)

Note 1: If you checked any of the boxes 1, 2, 3 or 4 above, you must provide all documentation that addresses the division of your pension. This means that you must provide either a Separation Agreement, Court Order, Divorce Order, Judgment including any approved/incorporated agreements that provide information on the distribution of your pension.

Note 2: In addition, if you checked boxes 2, 3 or 4, you must also supply the legal document(s) that prove that the relationship is terminated. This means that you must provide a Separation Agreement if you were in a common-law relationship and, either a Separation Agreement, Court Order, Divorce Order or Divorce certificate if you were married.

Note 3: If you checked boxes 4 or 5, you must submit a Death Certificate. You may check box 5-Death if: your relationship ended due to death (and you were not separated or divorced from this person), and you entered into a new relationship following the death of this person.

Example

You were once married but ceased to live with this person. You now have a common-law partner with whom you have been living continuously for more than 1 year. You never obtained the divorce from your first spouse. If you are in this situation, the following is how you would complete your information:

- under section 2, you would check “Common-law” and mark the name/details regarding your current partner (the person you are cohabiting with), and,
- under section 3, you would indicate the name/details regarding your first spouse (the person you married and are separated from) and would check box 2-Separation, but not divorce (if you were married).

under section 3, you would indicate the name/details regarding your first spouse (the person you married and are separated from) and would check box 2-Separation, but not divorce (if you were married).

No Separation Agreement and/or No Court Order

- If you checked the box below on page 2, you are required to submit a sworn Affidavit to the Canada Post Pension Centre. This means that the Affidavit must be prepared by your lawyer or notary. Also, the Affidavit must contain certain specific details. Please call the Canada Post Pension Centre and obtain the list of required details that must be included in the Affidavit.

- there were no Separation Agreement or Court Order produced after my relationship ended.
 ➤ **You must call the Canada Post Pension Centre as you will be required to submit a sworn Affidavit**, or**

- If you checked the box below on page 2, you are required to obtain from the Court, or your lawyer, a copy of your Court Order or Separation Agreement. If your Separation Agreement was **not** filed with the Court and cannot be located, you must call the Canada Post Pension Centre for information on submitting a sworn Affidavit.

- the Separation Agreement or Court Order produced after my relationship ended cannot be located.
 ➤ **For a Court Order, you must obtain copies of the documents from the Court/or your lawyer.**
 ➤ **For a Separation Agreement filed with the Court, you must obtain copies of the documents from the Court/or lawyer.**
 ➤ **For a Separation Agreement not filed with the Court, call the Canada Post Pension Centre to submit a sworn Affidavit.**

Additional Information

Survivor Benefits: Under the Plan provisions, the eligible Spouse or Common-law Partner may be entitled to receive survivor benefits payable from the Plan in the case of your death.

Division of Pension upon Marriage Breakdown/End of Common-law Relationship: Under the Plan provisions, a former Spouse or former Common-law Partner may be entitled to all or part of a Member’s pension benefit under the Plan.

If your marital status changes from the time you submit this form to the time your pension starts, you will need to complete a new Declaration of Marital Status form.

You can contact the Canada Post Pension Centre at 1-877-480-9220. (Hearing impaired members can contact the Pension Centre at 613-734-8265 TTY.)

The official Plan text governs your actual benefits from the Plan and is the final authority in any case of dispute.