

IMPORTANCE OF REGISTERING AS A NEW MEMBER

The Alberta Teachers' Retirement Fund (ATRF) maintains information about your ATRF contributions, your pensionable salary and years of service. This information will be used to calculate a benefit for you. In order to provide an annual plan member statement, newsletters and other updates, ATRF needs your current address and personal information.

WHY DOES ATRF REQUIRE CERTAIN SPECIFIC INFORMATION?

The information is used to prepare your individualized Plan Member Statement, which contains your most current benefit entitlements, and benefits that would be paid on your death. It is sent to you annually, after your employer has finished reporting to ATRF for each school year. You can obtain a statement anytime by accessing your personal data online through *MyPension* or by contacting ATRF.

We encourage members to update their personal details online. However, you can also use this form to report an **address change**. Please ensure you notify your employer of any changes because your employer reports your address to ATRF with each monthly payroll submission. If your employer still has your previous address, that information will override any change made by ATRF or by you online.

Name changes cannot be reported online. You must complete this form and submit it to ATRF. If your name has changed as a result of marriage, please send ATRF your original Marriage Certificate or a certified copy. If you have changed your name for reasons other than marriage, we will require an original or certified copy of your legal change of name document. See below for further information.

If you wish to change your beneficiary, you must complete an ATRF **Designating a Beneficiary** form.

REQUIRED DOCUMENTS

When ATRF pays you a benefit, we require certain documents to verify your eligibility. To eliminate the need to provide them later, we encourage you to send ATRF certified copies of your birth certificate or valid Canadian passport, your marriage certificate or other change of name document, and your spouse/pension partner's birth certificate or valid Canadian passport.

Following is a list of the people authorized to certify photocopies:

- ATRF Employees
- Your ATRF Employer – Human Resources or Payroll Personnel
- Bank Managers
- Notaries
- Lawyers
- Police Officers
- Doctors
- Members of Parliament
- Members of the Legislative Assembly
- Justices of the Peace
- Judges, or Officers of the Canadian Embassy

Note that a Commissioner for Oaths may not certify documents.

The person making the certified copy should specify that it is a certified copy of the original and sign and date the copy.

SPOUSE/PENSION PARTNER INFORMATION

Your Plan Member Statement contains valuable information about the benefits available to you at termination and retirement. It also includes information about Death Benefits payable to your spouse/pension partner. To calculate all of your benefit entitlements, ATRF needs to know if you have a spouse/pension partner and if so, his/her date of birth.

Definition of Pension Partner (Schedule 1, s.1(1)(hh.1) of the Plan Rules)

- (i) a person who, at the relevant time, was married to that member and had not been living separate and apart from that member for 3 or more consecutive years, or
- (ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with that member in a conjugal relationship for a continuous period of at least 3 years and was, during that period, held out by that member in the community in which they lived as being in that conjugal relationship.

Definition of Living Separate and Apart (Schedule 1, s.1(3) of the Plan Rules)

Persons are living separate and apart

- (a) if they are living separate and apart and either of them has the intention to live separate and apart from the other, or
- (b) if,
 - (i) they had been living separate and apart,
 - (ii) the separation was interrupted or ended by reason only that either of them became incapable of continuing to live separate and apart or of forming or having the intention to continue to live apart of that person's own volition, and
 - (iii) the separation would probably have continued if that person had not become so incapable.