

Application for Pre-Retirement Survivor/Beneficiary Pension Benefits

IMPORTANT - See reverse for information before completing this form – each applicant must complete their own form if more than one applicant is applying for a benefit.

Member's Pension Plan Name (Local Union)			
Member's Last Name		Member's First Name	
Member Certificate/Union ID Number	Member's Date of Birth MM/DD/YYYY	Member's Date of Death ¹	
Member's Marital Status at Date of Death ² <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Civil Union <input type="checkbox"/> Common-law <input type="checkbox"/> Separated/Divorced <input type="checkbox"/> Widowed			
Applicant's Relationship to Member <input type="checkbox"/> Spouse <input type="checkbox"/> Beneficiary <input type="checkbox"/> Estate Executer		Applicant's Social Insurance Number (Spouse or Beneficiary Only)	
Applicant's Last Name		Applicant's First Name	Applicant's Date of Birth ³ MM/DD/YYYY
Applicant's Address	City/Town	Province	Postal Code
Applicant's Home Phone Number		Applicant's Cell Phone Number	
Applicant's e-mail Address			
<p>I hereby certify that the above statements are true, accurate, and complete to the best of my knowledge and belief. I understand that Manion Wilkins & Associates Ltd. will use the information provided by me on this application form to administer my benefit entitlements. I hereby authorize the information on this form to be released to the deceased member's Union, Employer, and the Board of Trustees of this pension trust fund for the purpose of approving and verifying payment of pension benefits. A digital image of this release shall be deemed to be as valid as the original.</p>			
X _____ Applicant's Signature ⁴		_____ Date	

1. Proof of Death

We require proof death (e.g. Provincial Death Certificate or Funeral Director's Statement of Death)

2. Proof of Marital Status

If the applicant type is Spouse, we require a copy of your marriage certificate. If you were in a common-law relationship, we will send you a form you will need to complete, along with your application.

3. Proof of Age

We require proof of age for a Spouse or Beneficiary applicant (e.g. Driver's License, Birth Certificates issued by government authority, Citizenship papers, Government Passport.) before any benefit can be processed.

4. Signature

If you are unable to print and sign this form, we will accept a form completed with your full name typed into the signature field and submitted to us electronically via the e-mail address we have on file for you.

You can send your application to us in the following ways or through your local union office.



You can submit your completed application by fax to
416.234.2071



You can submit your completed application by secure e-mail to
askpension@manionwilkins.com



You can submit your completed application by mail to:
**Manion Wilkins & Associates
500 – 21 Four Seasons Place
Toronto, ON M9B 0A5**

IMPORTANT INFORMATION

Please print the application and complete it in full before you submit it for processing. Incomplete information will result in a delay in processing your request. You can submit the form to us by fax, secure e-mail, or mail. If there are any questions about completing this application, please contact us at (416) 234-5044 or 1(800) 263-5621.

Completed applications can be submitted to us directly, or to the deceased member's union local. If you submit the application to us directly, we will contact the union local to confirm the member's union history before processing your application.

Once we receive your completed application, and the local union has provided us information about the member's union history, we will process your application within 30 days of receipt of all information. Any missing, incomplete, or unsubmitted information required to process your application may result in additional delays.

The information about your benefit entitlement from the pension plan that will be prepared for you, is based on the information we have on file, the provisions of the Pension Plan and current legislation that governs the Pension Plan. The information provided will not guarantee you any right to receive a benefit or the amount of the benefit if the terms of the plan do not entitle you to that benefit. A change in any of the information on file could result in a difference in the actual benefit you receive from the plan. In the event of an error or omission in the information on the resulting statement provided to you, please contact our office immediately. Any incorrect information will be corrected upon verification.

The Trustees of the pension plan, Manion, and all service professionals retained by the Trustees are committed to protecting the privacy of your personal information. The information required to administer your benefits is kept in our offices. Your personal information is used in accordance with the privacy policy of the Pension Plan and shared only to the extent required by law with the plan sponsor, the local union and/or the institutions caring for your benefits.

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