

Form P2

(Division of Pensions Regulation, s. 4 (b))

REQUEST FOR DESIGNATION AS A LIMITED MEMBER

When to Use this Form

A Form P2 is used any time a spouse's share of the benefits remains in the plan/annuity to be administered. The spouse becomes a kind of member/annuitant with respect to the benefits, called a "limited member" and is entitled to receive a proportionate share of

- *payments under a pension that has commenced,*
- *benefits under a defined benefit provision before pension commencement,*
- *disability benefits under a plan*
- *annuity payments,*
- *benefits that are subject to an original order or agreement made before Part 6 of the Family Law Act came into force, and*
- *benefits in a defined contribution account, if the administrator consents to the spouse's proportionate share remaining in the plan.*

Form P2 is used in every case for dividing benefits except where benefits in a defined contribution account are being transferred from the plan, when a Form P3 is required. [Please print]

To: Administrator of plan/annuity issuer

Name of plan/annuity:

UBC Staff Pension Plan

Address of administrator/annuity issuer:

**201 – 2389 Health Sciences Mall
Vancouver, BC Canada V6T 1Z3
Attention: Margaret Leathley
Pension Administrator**

From: Spouse of member/annuitant [Note: "spouse" includes a person who has lived in a marriage-like relationship with the member/annuitant for a continuous period of at least two years and also includes a former spouse.]

Name of spouse: _____

Address: _____

Email: _____

Tel: Home _____ Work _____ SIN: _____

Date of Birth: _____

[The administrator/annuity issuer will use this information to contact you about important matters. Make sure it is accurate and that you promptly advise the administrator/annuity issuer of any changes.]

In relation to: Plan Member/annuitant _____

Address: _____

Email: _____

Telephone: Home _____ Work _____

Social Insurance or Plan Identity Number: _____

Employer: _____

Other requirements:

A copy of the agreement or order dividing the benefits must be provided [*Please attach or enclose the agreement or order with this Form.*]

An administrator/annuity issuer is entitled to charge a fee to register a spouse as a limited member of \$750 (or \$925 if the benefits are in a hybrid plan).

Request:

I request that _____ [*name of spouse*] be designated as a limited member with respect to the benefits/annuity.

The following applies to a spouse who becomes a limited member:

- for a pension, disability benefits or an annuity that is being paid, this form will also act as a request for the administrator/annuity issuer to pay the limited member his or her proportionate share of those payment;
- for benefits if the pension has not commenced, the administrator will advise the limited member about his or her options for receiving a separate pension, or, in some cases, a transfer of his or her proportionate share from the plan in a lump sum. The limited member may exercise those options by filing a Form P4;
- for benefits in a defined contribution account, the limited member will be entitled to have his or her proportionate share transferred to a separate account in the plan, if the administrator consents.

Signed _____ [*This is normally signed by the spouse but may be signed by the member under section 113 (2) of the Family Law Act.*]

Date _____

Signed (witness to signature) _____

Name of Witness _____

Address of Witness _____