

Pension Election

After considering the various pension options available from the Carleton University Retirement Plan (registration #0526616), I elect the following pension effective _____ and payable monthly in arrears.

Single Life Pensions:

- Single life pension payable for my remaining lifetime, and **guaranteed for** _____ **years** in any event.
- Single life pension payable for my remaining lifetime, **without guarantee**. I am aware that on my death, my pension will cease and no payments of any kind will be due from the Plan to my beneficiaries, heirs, or estate, even if my death occurs immediately following the date of my first pension payment.
- Integrated pension and guaranteed to age _____.
- Integrated pension without guarantee.

Joint Life Pension:

- Joint life pension payable to me for my remaining lifetime, and **guaranteed for** _____ **years** in any event; upon my death, my pension will **continue to my co-annuitant**, if living, for the remainder of his/her lifetime, at _____% of the full pension.
- Joint life pension payable to me for my remaining lifetime, **without guarantee**; upon my death, my pension will **continue to my co-annuitant**, if living, for the remainder of his/her lifetime, at _____% of the full pension.
- Joint life pension payable to me as long as both my co-annuitant and I are living, and **guaranteed for** _____ **years** in any event; upon the death of either my co-annuitant or myself, my pension will **continue to the survivor**, for the remainder of his/her lifetime, at _____% of the full pension.
- Joint life pension payable to me as long as both my co-annuitant and I are living, **without guarantee**; upon the death of either my co-annuitant or myself, my pension will **continue to the survivor**, for the remainder of his/her lifetime, at _____% of the full pension.

Co-Annuitant Name: _____ Co-Annuitant S.I.N.: _____

Are you currently exempt from Canada Pension Plan contributions? YES NO

Please indicate which of the following apply to you:

- You are retiring from active employment at Carleton University.
- You are starting your pension, but will continue working at Carleton.
- You are a former employee electing to start your pension.
- You are a surviving spouse electing a monthly pension.

Employee Signature

Employee Banner ID

Name (Please Print)

Date

The personal information requested on this form is collected in accordance with Sections 38(2) and 41(1) of the Freedom of Information and Protection of Privacy Act (FIPPA), R.S.O. 1990, c.F.31 as amended. The information provided will not be used for any purposes other than those stated upon this form unless the applicant provides express written consent. Should you have any questions concerning your personal information, please contact the Assistant Director, Infrastructure and Renewal of Human Resources. Carleton University is fully compliant with FIPPA and endeavours at all times to treat your personal information in accordance with this law.