

Carleton University Retirement Plan Enrolment Declaration

For eligible employees, who are either under the age of 30 or over the age of 65, enrolment in the Pension Plan is optional.

To participate in the Plan, each eligible Employee will be required to sign and deliver to the University such enrolment forms as the University may require for this purpose.

MEMBER INFORMATION <i>(Please Print)</i>				
EMPLOYEE ID	LAST NAME	FIRST NAME	MIDDLE INITIAL	DATE OF BIRTH (yyyy/mm/dd)
DECLARATION				
<p><u>I am under the age of 30:</u></p> <p><input type="checkbox"/> I wish to enrol in the Carleton University Retirement Plan. I understand that once I am enrolled this decision is irrevocable.</p> <p><input type="checkbox"/> I do not wish to enrol in the Carleton University Retirement Plan at this time. I understand that I will automatically be enrolled on the July 1st coincident with or immediately following my 30th birthday.</p> <ul style="list-style-type: none"> • I understand that if I do not join at this time and wish to buyback the service at a later date, I will be required to contribute the full cost of the benefit (including the University's share) based on my age and salary at the time of purchase. • I may revoke this election and join the pension plan at any time prior to the date of mandatory enrolment. <p><u>I am over the age of 65:</u></p> <p><input type="checkbox"/> As of the date of signing of this form, I am over 65 years old. I DO NOT wish to participate in the Carleton University Retirement Plan. I understand that this election is irrevocable.</p> <p>_____</p> <p>Signature of Employee</p> <p>_____</p> <p>Date</p>				

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Notes regarding enrolment

Information in this document may include interpretations and administrative procedures as understood at the time of issuance. Carleton University reserves the right to change or amend these interpretations and administrative procedures, whether or not the information in this document is updated.

Eligibility for Enrolment

Full and part-time continuing employees (with appointment of at least 50%) and full and part-time Term employees with appointments of 12 months or more are eligible to join the plan. You may be enrolled in the plan on the first day of the month coincident with or following your date of hire. Membership is compulsory by the first day of July after you reach age 30.

If you are appointed to less than a one-year term, you are not eligible to join the plan. If your term is extended beyond a one-year period, you may join the plan retroactive to the date of your appointment.

Staff with full-time term appointments of at least six months but less than 12 months, who have been appointed to a second term, will be eligible to join the plan from the date of appointment to the second term if the break between the first and second term is less than 12 months.

Casual employees who earn at least 35% of the Year's Maximum Pensionable Earnings (YMPE) under the Canada Pension Plan (CPP) or have worked 700 hours, in each of the preceding two consecutive calendar years are eligible. Once a casual employee becomes a member of the Plan, membership will continue if employment continues, regardless of earnings level or hours worked.

Once you join the plan, you must remain a member while employed by the University.

Compulsory Enrolment

If eligible, you will be enrolled in the plan automatically on the July 1 coincident with or following your 30th birthday.

If you wish to join the plan prior to the compulsory date, you must complete the enrolment form to this effect to Human Resources.