

FORM P1 (Division of Pensions Regulation, s. 4 (1)(a))

**CLAIM AND REQUEST FOR INFORMATION AND NOTICE**

*When to Use this Form*

A Form P1 is used by a spouse who is making a claim to an interest in the member's/annuitant's benefits. After this form is delivered to the administrator/annuity issuer, the spouse is entitled to receive

- information from the administrator/annuity issuer about the benefits, and
- 30 days' advance notice of changes of circumstances affecting the benefits.

*[Please print]*

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**To: Administrator of plan/annuity issuer**

*[Required]* Name of plan/annuity \_\_\_\_\_

*[Optional]* Address of administrator/annuity issuer \_\_\_\_\_

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**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.]*

*[Required]* Name of spouse \_\_\_\_\_

*[Required]* Address \_\_\_\_\_

*[If available]* Email address \_\_\_\_\_

*[If available]* Telephone \_\_\_\_\_

Social Insurance Number \_\_\_\_\_

*[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.]*

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**In relation to: Plan member/annuitant**

*[Required]* Name of member/annuitant \_\_\_\_\_

*[Optional]* Address \_\_\_\_\_

*[Optional]* Email address \_\_\_\_\_

*[Optional]* Telephone \_\_\_\_\_

*[At least one of the following is required]* Date of Birth, Social Insurance Number, or Plan Identity Number \_\_\_\_\_

*[Optional]* Employer \_\_\_\_\_

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Spouse's statement

I, \_\_\_\_\_ *[name of spouse]* am claiming an interest in the benefits of the member/annuitant based on section 81 of the *Family Law Act*. *[see below]*

*[You are not required to authorize the administrator/annuity issuer to communicate with a representative. If you wish to authorize that communication, you must complete the following, otherwise, the administrator/annuity issuer cannot communicate with your representative.]*

I authorize you to communicate with and release information to my representative(s):  
*[include name(s) and address(es) of representative(s)]*

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This authorization expires on \_\_\_\_\_ *[date]*.

Signed *(spouse)* \_\_\_\_\_

Date of Statement \_\_\_\_\_

Signed *(witness to signature of spouse)* \_\_\_\_\_

***Family Law Act, section 81:***

**81** Subject to an agreement or order that provides otherwise and except as set out in this Part and Part 6 *[Pension Division]*,

- (a) spouses are both entitled to family property and responsible for family debt, regardless of their respective use or contribution, and
- (b) on separation, each spouse has a right to an undivided half interest in all family property as a tenant in common and is equally responsible for family debt.

**Note that the administrator/annuity issuer must respect privacy in accordance with privacy legislation.**