

GENERAL INFORMATION

This guide is provided for information purposes only and does not supersede the applicable legislation. We suggest you read it carefully as it contains answers to most questions you may have regarding the retirement pension application.

This form is prescribed under section 150 of the *Act Respecting the Government and Public Employees Retirement Plan* (R.S.Q. c. R-10). Its use is mandatory if you apply for a retirement pension under the following plans:

- Government and Public Employees Retirement Plan (RREGOP);
- Pension Plan of Management Personnel (PPMP);
- Pension Plan of Certain Teachers (PPCT);
- Teachers Pension Plan (TPP);
- Civil Service Superannuation Plan (CSSP).

In order to use this form, you must be entitled to:

- an immediate pension that will be paid as soon as you retire or on a later date of your choice;
- OR**
- a deferred pension that will be paid on a future date set under your plan or whose value may be transferred to a Locked-In Retirement Account (LIRA) or a Life Income Fund (LIF).

Your eligibility to one of those pensions is determined based on your age and the years of service you have accrued on the end date of your membership to the plan. To find out more about the eligibility criteria, you can consult your retirement plan's newsletter, available on our website.

Some key points

- We recommend that you fill out and send us this form at least 90 days before the month of your retirement. For example, if your employment is to end during the month of December, we should receive your application at least 90 days before December 1st, that is, before September 2nd.
- If your name is on a recall list covered by your collective agreement or your work conditions, we should receive your pension application after your date of end of employment. This will allow us to get your participation data, including the date of the last day when you had employment affected by one of the pre-mentioned plans. Please note that this does not apply if you have reached the maximum age of membership in your plan.
- On the date of your end of employment, you must have ceased all employment affected by the plan(s) under which you apply for the present pension.
- If the application relates to the transfer of the value of the deferred pension, either in a Locked-In Retirement Account (LIRA) or a Life Income Fund (LIF), you must attest not having worked in employment affected by your plan since at least 210 days following the date of end of employment.
- You must fill out a form for each employer for whom you worked during part of or for the entire last two years.
- **This form cannot be used to obtain a pension estimate.** To obtain an estimate, please consult our website where you will find the form *Application for a Pension Estimate* (009A) and the calculator Pension Estimator.
- Your employer can provide further information to help you fill out this form.
- As part of the processing of your pension application, you will receive some documents, including the reply-form *Your Options*. On that document you will make a choice regarding the payment of your benefits and indicate the date of your retirement (which corresponds to the effective date of the pension).

Retirement and Buy-Back of Service

In order for you to plan your retirement as well as possible, we suggest you discuss with your employer about the possibility of including a buy-back application to your application for a retirement pension. The buy-back of periods of service or absence without pay would increase the amount of your benefits. Note that you will not be able to buy back service when retired.

To apply for a buy-back, you and your employer both have to fill out the forms *Application for Buy-Back* (727A) and *Attestation of a Buy-Back Period* (728A).

To obtain more information, you can consult the brochure *Buy-Backs* available on our website. This brochure addresses various aspects of buy-backs of service: advantages, cost, terms of payment, effects on taxation, etc.

INFORMATION ON EACH PART OF THIS APPLICATION FORM

Part A – Information on active or non-active member

You must provide information that identifies you as an active member or non-active member, whether you accumulate or retain your rights in a retirement plan, even if you are no longer employed.

The **identification number** is a personal number given to you for the purpose of identification. That number has 10 digits and starts with 17. You can find that number on various communications sent by us such as your statement of participation on your public sector pension plan. You can enter it in place of, or in addition to your social insurance number.

Part B – Information related to the application

Name of the pension plan

You must check the affected pension plan in the present retirement application.

Employment relationship

To be entitled to the payment of benefits accrued in the plans entered in your application, your working relationship must be broken before the date of your retirement for all the jobs you had for the same employer or for different employers.

Your working relationship is broken following resignation, layoff, end of a work contract or expiration date of the recall list on which your name appears, depending on the provisions in your collective agreement or working conditions.

If your application is under the RREGOP or the PPMP and you have employment affected by the Pension Plan of Peace Officers in Correctional Services (PPPOCS), you must also end your employment in order to be entitled to your retirement benefits.

Part C – Checklist and documents to be attached to your application

Please check that the documents requested are attached to your application before sending it to us.

- **Proof of birth (if you live outside the province of Québec)**

To find out which proofs are accepted, please consult the section Forms on our website.

- **Personalized cheque specimen**

You can benefit from the direct deposit of your pension to the financial institution of your choice each 15 of the month or, if the 15 is not a business day, the last business day before that date, without delay due to cashing. To do so:

- Check the box provided to that effect;
- Attach a void personalized cheque.

You will thus benefit from a fast and secure form of payment, while acting as an eco-concern citizen by avoiding the use of paper and transport of the cheques.

- **Application for a buy-back of service**

If you apply for a buy-back of service, it must be received **no later** than the end date of your employment or the date of receipt of your application for a pension if that date is subsequent to that of the end of your employment. To do so, attach the requested forms.

Part D – Consent and signature of the active or non-active member

Your employer may need to know the decision regarding your eligibility to a pension. If it is the case and if you wish for us to send a notice of decision to your employer please check “yes” in the box provided. An absence of answer will be considered as a “no”.

To be valid your application must be signed and dated, otherwise it will be returned to you to be completed.

Parts E to J – Information to be provided by the employer

The person applying is responsible to have each employer to which he/she was linked during part or all of the last two years fill out those parts. A guide on the subject is available to employers on our website. It contains all the necessary information to help them fill out those parts adequately.

Before completing this form, consult the general information in the attached guide.

You must fill it out and give it to each employer for whom you worked during the last two years. They will have to fill out parts E to J.

You must gather up all documents and send them to us by mail, fax or secure email.

Part A – Information on active or non-active member

Last name		First name		
		Year	Month	Day

Name at birth (if different)	Date of birth	Social insurance number
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Gender <input type="checkbox"/> F <input type="checkbox"/> M	Language of correspondence <input type="checkbox"/> French <input type="checkbox"/> English	17 Identification number*
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* You will find this ID number in your statement of participation on your public sector pension plan.

Home address

Number	Street, avenue, boulevard, rural route	Apartment	P.O. Box
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City, town, municipality	Province or State	Country	Postal code
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Area code	Home phone number	Area code	Work phone number	Extension
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Area code	Other number
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Part B – Information related to the application

1. Name of the pension plan

Check the plan(s) for which you are applying.

RREGOP PPMP PPCT TPP CSSP

2. Employment relationship

During all or part of the last two years, did you work in more than one position under the RREGOP, the PPMP or the PPPOCS, for one or several employers? Yes No

Will your employment relationship(s) be broken from all your employers before the date of your retirement? Yes No

If "No", see the guide.

Part C – Checklist and documents to attach to your application

To make sure to include everything before sending your application for a retirement pension, you can use the checklist below.

- If you live outside of the province of Québec, you must provide a proof of birth. The proofs vary depending on your birth place. Consult section Forms on our website to find out which proofs are accepted.
- If you wish to benefit from direct deposit, attach a void **personalized** cheque.
- If requested, attach the forms *Application for Buy-Back (727A)* and *Attestation of a Buy-Back Period (728A)*.
- Fill out all parts A to C of the form.
- Sign part D.

Part D – Agreement and signature of the active or non-active member

I hereby authorize Retraite Québec to inform my employer of the decision regarding my eligibility for a pension and the date of my retirement.

Yes No

I am aware that this application for a retirement pension will become final and irrevocable as soon as my benefits are deposited directly to my account or when my first pension cheque is cashed.

I hereby certify that the information provided in Parts A and B of this form and the attached documents is accurate and complete.

If my application is related to the transfer of the value of the deferred pension, either in a Locked-In Retirement Account (LIRA) or a Life Income Fund (LIF), I attest not having been employed under my pension plan since a minimum of 210 days following the end date of my employment.

Signature

Year Month Day
|_|_| |_|_| |_|_|
Date

Access to documents held by public bodies and the protection of personal information

The personal information collected in this form and, if applicable, in any documents that must be attached, is necessary to study your application. Only authorized members of our personnel have access to your information if they are necessary as part of their duties.

Apart from the optional sections, not providing the information requested can lead to delays in processing or the void of your application.

The Act Respecting Access to Documents Held by Public Bodies and the Protection of Personal Information allows you to consult your personal information and have it corrected.

Parts E to J must be completed by the employer's authorized representative. For further information, consult the **guide related to the information to be provided by the employer** (available in French only).

Part E – Employer information

Name of the employer		Employer identification number		
Number	Street, avenue, boulevard, rural route	Ministry or organization number		
P.O. Box	City, town, municipality	Province	Postal code	
Area code	Phone number	Extension	Area code	Fax number

Part F – Identification of active or non-active member

Last name			First name		
Year	Month	Day			
Date of birth			Social insurance number		

Part G – Administrative information

1. Employment status

a) Permanent status:

– Indicate if the person works full-time or part-time.

Permanent full-time

Permanent part-time

Year Month Day

– Indicate the date of end of employment.

Year	Month	Day
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b) Employment status other than permanent:

– Indicate status.

(Examples: recall list, casual, seasonal)

Employment status

Please take into account the following precisions to determine the dates to enter for the following questions.

A person has **relevant employment** during the whole period during which he/she works full-time or part-time. A person who works on call only works on the following days:

- the days worked;
- the paid days of absence (ex.: vacations, sick days, legal holidays, etc.);
- the days declared under codes of absence A, B, C, D and E.

Social insurance number	Employer identification number
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Part H – Financial information regarding the active or non-active member (cont.)

2. Financial data declaration for the last year

a) Basic financial data

Fields with an asterisk (*) are mandatory.

Field "***Job number" is mandatory for the education sector.

	*Year of membership		
	*Pension plan	Group	*Retraite Québec calendar number
	**Job number	*Job class	Employer contribution <input type="checkbox"/> Yes <input type="checkbox"/> No
Type of declaration	*Daily factor		
	Year Month Day	Year Month Day	
*Basis of remuneration <input type="checkbox"/> 200 <input type="checkbox"/> 260	Date of beginning of employment		Date of end of employment
\$ _____	\$ _____	_____ %	
Contributory salary	Employee contribution	Partial – % of the time	
\$ _____	\$ _____	Adjusted salary <input type="checkbox"/> Yes <input type="checkbox"/> No	
Non-contributory salary (after reaching maximum service)	Basic annual salary		
Year Month Day			

Date of end of period			

The "Date of end of period" must be entered only for the last year and must correspond to the date when financial data are declared for the member of the plan at the time the form is filled out.

b) Salary range (200-day basis)

Effective date (Year/Month/Day)	Annual basic salary (\$)

c) Absences

Code	Days	Salary (\$)	Retroactive amount (\$)

d) Retroactivity

Year	Amount (\$)

Year Month Day

Date of payment

\$ _____

Non-contributory amount
(after reaching maximum service)

Social insurance number

Employer identification number

Part I – Checklist and documents to attach to the employer declaration

To make sure to include everything before sending your application for a retirement pension, you can use the checklist below.

- Attach the form *Déclaration relative à la troisième année d'exonération* (091) (available in French only), if needed, depending on the precisions regarding disability in part G.
- Attach a copy of the agreement in view of retirement under the PPMP, if needed, depending on the precisions in part G.
- Fill out parts E to J.
- Sign part J.

Part J – Signature of employer's authorized representative

I hereby certify that the information provided in parts E to I of this form comes from the employer's files and that it is accurate and complete.

Last and first name of the authorized representative (IN BLOCK LETTERS)

Title or function

Area code

Phone number

Extension

Year

Month

Day

Signature of authorized representative

Date

The person applying for a retirement pension must send us all requested documents:

By mail
Retraite Québec
475, rue Saint-Amable
Québec (Québec) G1R 5X3

Fax
418 644-8659

Secure email
www.retraitequebec.gouv.qc.ca/infossecteurpublic

TO CONTACT US

By phone
418 643-4881 (Québec region)
1 800 463-5533 (toll free)
People with a hearing impairment
418 644-8947 (Québec region)
1 855 317-4076 (toll free)

Subscribe to our electronic mailing list

By subscribing to our electronic mailing list, you can keep up with the latest information on the various public sector pension plans. The registration form is available on our website.