



Service Record (Actuarial Reserve-based Cost Application)

Use this form to apply for service that may be eligible for buyback based on the cost of providing the future benefit at actuarial reserve rates. Section I is to be completed by the member. The rest of the form is to be completed as required by the current employer, former employer/pension plan administrator and then returned to the member. The completed form should be sent to Public Service Pension Plan (PSPP) 5103 Windermere Blvd. SW Edmonton, AB T6W 0S9 Fax: 780-421-1652 PSPP will return an incomplete application to the current employer.

SECTION I: MEMBER INFORMATION AND AUTHORIZATION - completed by the member

I am a member of PSPP and I authorize my employer and former employer/pension plan administrator to supply service and salary information to PSPP so that the cost of my buyback service can be calculated.

_____	_____	_____
member's first name	member's last name	member's former last name (if applicable)
_____	_____	_____
phone number	member's social insurance number	
_____	_____	_____
member's address	city, province	postal code
_____	_____	_____
former positions and/or department	service from date (YYYY/MM/DD)	service to date (YYYY/MM/DD)

Have you been or will you be subject to a family property order or agreement dividing your benefits? YES NO

The funds related to the service in Section IV:

1. Are held in a Registered Retirement Savings Plan (RRSP). YES NO

2. If YES, are the funds locked-in? YES NO

Please check with your financial institution to determine if you are eligible to transfer your locked-in funds to Alberta where they will be administered under Alberta's *Employment Pension Plans Act*.

Eligible service may require a Past Service Pension Adjustment to be reported to the Canada Revenue Agency for certification once a first payment is received. If your RRSP limit is exceeded, your application for certification may be cancelled.

_____	_____
member signature	date signed (YYYY/MM/DD)

SECTION II: CURRENT EMPLOYMENT - completed by the current employer

Member's current employment status (check one):	Full-time	Part-time
1. Full-time:		
Current full-time annual pensionable salary:	\$ _____	
2. Part-time: (see the example →)		
a) Pensionable salary to current date:	\$ _____	
b) Credited service to current date:	_____	
c) Annualized* pensionable salary (a ÷ b = c)	\$ _____	

Example of how to calculate the annualized* pensionable salary:

a) Pensionable salary to current date: \$35,000.00

b) Credited service to current date: 0.4823 yr

c) \$35,000.00 ÷ 0.4823 = \$72,568.94*

*Adjusted or calculated so as to reflect a rate that is based on a full year.

On behalf of the **current employer**, I confirm the information in section II is accurate.

_____	_____
employer name	telephone number (area code and number)
_____	_____
signature of authorized person	printed name of authorized person
_____	_____
	date signed (YYYY/MM/DD)

Personal information on this form is collected under the authority of section 40 of Schedule 2 of the Alberta *Joint Governance of Public Sector Pension Plans Act* and section 33 of the Alberta *Freedom of Information and Protection of Privacy Act* for pension administration purposes. If you have any questions regarding the collection of this information, contact the PSPP Member Services Centre at 1-877-453-1PSP (1777), or write to: 5103 Windermere Blvd. SW, Edmonton, AB T6W 0S9.



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SECTION III: PENSIONABLE SERVICE/SALARY INFORMATION - completed by the (check one)

current employer (prior service) former employer former registered pension plan (RPP) administrator

Type of pension plan (check one)

RPP defined benefit (DB) RPP defined contribution (DC) group RRSP
 deferred profit sharing plan (DPSP) combined DB/DC ratio DB ____% DC ____% other

name of registered pension plan _____

CRA registration number _____

SECTION IV: YEAR-BY-YEAR DETAILS - completed by the (check one)

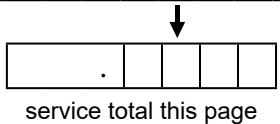
current employer (prior service) former employer former RPP administrator

Report the employee's pensionable salary. For service after 1991, report the full, uncapped pensionable salary even though it may exceed the salary cap for the year.

service year (YYYY)	FT/PT ¹	service from date (YYYY/MM/DD)	service to date (YYYY/MM/DD)	length of pensionable service ²	historical pensionable salary ³ <small>(provide for each year after 1989)</small>	pension adjustment/ past service pension adjustment ⁴ <small>(provide for each year after 1989)</small>	reason code ⁵ <small>(APS administered plans only)</small>
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Explanation of table headings:

- ¹ FT = full-time; PT = anything other than full-time
- ² pensionable service expressed to 4 decimal places for each service period
- ³ pensionable salary for the length of the service
- ⁴ pension adjustment reported to CRA for service period
- ⁵ refer to *Pension e-guide* for explanation for 2A and 9A



⁵ Reason codes:

- 1A Reinstatement of service
- 2A Non-contributory service
- 2B Class not brought under plan
- 2C Employer not a participant in plan
- 5A Married female, opted out of plan
- 9A Service with non-participating plan, no funds left on deposit



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1. Please provide a reason for any of the service coded as 2A.
2. Does any of the service include a probationary/waiting period? Yes No
- a) If yes, provide the dates. (from) _____ (to) _____
- b) Was this service credited under your pension plan? Yes No
3. Did an employee/employer relationship exist? (This was not consulting or contract work.) Yes No
4. If teaching or research service, was the service with a university or college in Canada? Yes No
- a) If yes, was the employee paid for this service? Yes No

SECTION V: DISPOSITION OF FUNDS - completed by the (check one)

current employer (prior service) former employer former RPP administrator

1. Did the employee receive a return of pension contributions on leaving the pension plan? Yes No
- a) If a refund was issued, please provide the following information:
- i) date the refund was issued: _____
 - ii) taxable amount of refund: \$ _____
 - iii) amount transferred to an RRSP: \$ _____
 - iv) amount of maximum transfer value excess included in the RRSP transfer: \$ _____
 - v) amount transferred to a Locked-in Retirement Account (LIRA): \$ _____
2. If the pension plan was a combined DB/DC plan, please provide the breakdown of service:
- a) service credited under DB: _____
 - b) service credited under DC: _____

SECTION VI: CERTIFICATIONS FROM THE FORMER EMPLOYER AND/OR THE FORMER PENSION PLAN ADMINISTRATOR

On behalf of the **former employer**, I certify that the above information is accurate.

employer name

signature of authorized person

printed name of authorized person

date signed (YYYY/MM/DD)

telephone number (area code and number)

On behalf of the **former pension plan administrator**, I certify that the above information is accurate.

RPP name and number

signature of authorized person

printed name of authorized person

date signed (YYYY/MM/DD)

telephone number (area code and number)

Once **all** the information is complete, please make a copy for your records and forward the completed form to PSPP at the address shown on the front of the form, or fax it to 780-421-1652.

Please ensure all three pages of this application are completed before it is submitted to PSPP.