

# RECIPROCAL TRANSFER AGREEMENT APPLICATION FORM



Between

The Pension Plan for Part-Time and Seasonal Employees of the Province of NB and

The Pension Plan for Full-Time CUPE 2745 Employees of NB School Districts

## Section 1 - To be Completed by the Applicant

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SIN (optional): \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Vestcor Reference Number: \_\_\_\_\_ OR Employee ID Number: \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (Attach a copy of Proof of Birth - Mandatory) Correspondence Requested In: English  French

Are you retiring? Yes\*  No  If yes, indicate retirement date: \_\_\_\_\_ \*priority will be given to your application

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Employer: \_\_\_\_\_

**PRIVACY CONSENT:** The personal information collected on this form will be used by Vestcor to: identify the employee making the request and the employer; determine language preference; confirm employment history and pension plan participation; determine eligibility, the cost to transfer the service, the service that would be credited, and any shortfall amount; contact the employee or employer as necessary; and ultimately ensure that the pension plans are administered in accordance with their governing documents and applicable legislation. The information may be disclosed to Manulife Financial Corporation in order to process the transfer and to the Canada Revenue Agency as required by law. If you have any questions about the collection and use of this information, contact Vestcor's Member Services team, by mail at P.O. Box 6000, Fredericton, NB, E3B 5H1, by phone at (506) 453-2296 or 1-800-561-4012, or by email at [info@vestcor.org](mailto:info@vestcor.org). In addition, please note that Vestcor's Privacy Statement is available at [www.vestcor.org/privacy](http://www.vestcor.org/privacy).

**AUTHORIZATION:** I certify that the information above is accurate.

Signature: \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

## Section 2 - To be Completed by the Employer

### Transferring from (Exporting Plan):

The Pension Plan for Part-time and Seasonal Employees of the Province of NB to

OR

The Pension Plan for Full-Time CUPE 2745 Employees of NB School Districts to

### Transferring to (Importing Plan):

The Pension Plan for Full-Time CUPE 2745 Employees of NB School Districts

The Pension Plan for Part-time and Seasonal Employees of the Province of NB

Continuous Employment Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

Date Joined Exporting Plan: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

Date Employment Status Changed: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

Date Joined Importing Plan: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

Bi-weekly Salary at Date of Application: \_\_\_\_\_

Number of Pay Periods for Applicant (per year): \_\_\_\_\_

## Section 3 - To be Completed by the Employer

Only for applicants transferring from the Pension Plan for Part-Time & Seasonal Employees of the Province of NB to the Pension Plan for Full-Time CUPE 2745 Employees of NB School Districts

Part-Time Employment History (while contributing to the Pension Plan for Part-Time and Seasonal Employees of the Province of NB):

| Period                | % of Full-Time Worked<br>(Actual hours worked, not contracted to work hours) | Bi-Weekly Hours | Bi-Weekly Salary | Salary if Worked at 100% |
|-----------------------|--|-----------------|------------------|--------------------------|
| From: _____ To: _____ |  |                 |                  |                          |
| From: _____ To: _____ |  |                 |                  |                          |
| From: _____ To: _____ |  |                 |                  |                          |
| From: _____ To: _____ |  |                 |                  |                          |

\*Please attach an additional form if you require more lines

Employer Signature \_\_\_\_\_ Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Day Month Year

Please return completed form as soon as possible to:  
Vestcor  
P.O. Box 6000, Fredericton, NB E3B 5H1  
Fax: 506-457-7388

For more information, please contact Vestcor at:  
Telephone: 506-453-2296 or 1-800-561-4012 (toll free)  
Email: [info@vestcor.org](mailto:info@vestcor.org)  
Website: [vestcor.org](http://vestcor.org)