

L1011
Request for Pension Actuarial Valuation
upon Marriage Breakdown
for BC Public Sector Pension Plans
(i.e. Public Service, Municipal, College, Teachers and WorkSafe BC)

Note: This is an interactive form. Please save this form to a local drive prior to entering your information.

Member Information							
First Name				Last Name			
Gender		Date of Birth	Year		Month		Day
Life Expectancy		<input type="checkbox"/> Normal			<input type="checkbox"/> Sub-Normal		
If Sub-Normal, Explain Why							

Spouse Information							
First Name				Last Name			
Gender		Date of Birth	Year		Month		Day
Life Expectancy		<input type="checkbox"/> Normal			<input type="checkbox"/> Sub-Normal		
If Sub-Normal, Explain Why							

Company Information							
Full Legal Name							
Member Status		If Other, please specify					
Work Schedule		If Other, please specify					
Member's current Full-Time Equivalent (FTE) pensionable salary							
Effective Date of Current Salary							
Date of Termination/Retirement, if applicable	Year		Month		Day		
If Retired Pre-65, Pension Amount							
If Retired Post-65, Pension Amount							
If Retired, Form of Pension Chosen							

Marriage Information							
Date of Cohabitation, if applicable ⁽¹⁾	Year		Month		Day		
Date of Marriage	Year		Month		Day		
Date of Separation	Year		Month		Day		
Calculation Date ⁽²⁾	Year		Month		Day		

*(1) The Date of Cohabitation is required only if you wish to use this date as the start of the marriage-like relationship period for pension division purpose.
 (2) The Calculation Date is usually a future date when the parties separate their assets by way of mediation or trial. If no date is scheduled then a date in the near future may be used. Only service accrued within the marriage-related/common-law period will be used for valuation purposes.*

Pension Information	
Pension Plan Name	<input type="text"/>
Person Profile included? <i>The person profile is available at no cost from the Pension Corporation at www.pensionbc.ca.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Latest Member Annual Pension Statement included?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you want an external (written) report?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you want an internal (telephone) report?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you intend to have a division within the pension plan (i.e. having the non-member spouse registered as a limited member of the plan)? ⁽³⁾	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you intend to make a compensation payment (i.e. division outside the plan)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you want a recording of the teleconference? <i>(the fee for this is \$50 plus tax)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fee enclosed? ⁽⁴⁾	<input type="checkbox"/> Yes <input type="checkbox"/> No

⁽³⁾ If the answer is yes, please contact us for a fee quote. Further information regarding plan-administered split can be obtained from our website.

⁽⁴⁾ Prepayment of fee by cheque or credit card is required if this request is made by the pension holder or the spouse. Please call our office if you wish to pay by credit card.

Lawyer/Mediator Information			
<i>if this request is being made by a lawyer or mediator, please complete and sign this section</i>			
Lawyer/Mediator Name		<input type="text"/>	
Law Firm Name		<input type="text"/>	
Suite No.	Street No.	Street Name	
City		Province	Postal Code
I hereby undertake to pay Westcoast Actuaries Inc.'s fee for their pension actuarial valuation services.			
Lawyer's Signature	<input type="text"/>		Date <input type="text"/>

Contact Information			
<i>if this request is being made by the pension holder and/or spouse, please complete and sign this section</i>			
Suite No.	Street No.	Street Name	
City		Province	Postal Code
Phone Number		Email	
Signature	<input type="text"/>	Date	<input type="text"/>

All pension valuations are completed in line with the Canadian Institute of Actuaries' Standards of Practice on the Capitalized Value of Pension Plan Benefits for a Marriage Breakdown and Section 11 of the Division of Pension Regulations to the Family Law Act effective March 18, 2013. Unless otherwise instructed, we will assume that future wages increase by inflation plus 1%.