

Pension Estimate Request Form

Purpose of Form

This form allows employers to request a pension estimate from UAPP on behalf of a member. It gathers the key member and employment information needed to prepare an estimate using the most current data available. Providing complete and up-to-date information will support timely processing and reduce the need for follow-up.

SECTION 1 — MEMBER INFORMATION

First Name: _____ Middle: _____ Last Name: _____
SIN: _____ Date of Birth(dd/mm/yyyy): _____
Current Employment Status: Active On Leave Terminated
Employer: _____
Last Day Worked (dd/mm/yyyy): _____ Retirement Date (dd/mm/yyyy): _____

SECTION 2 — SPOUSAL INFORMATION

Does Member have a Spouse? Yes (Complete information below) No

First Name: _____ Middle: _____ Last Name: _____
Date of Birth(dd/mm/yyyy): _____

SECTION 3 — MEMBER ACKNOWLEDGMENT – DELIVERY METHOD

The member acknowledges that the pension estimate package will be made available through UAPP's secure messaging centre within the Plan Member Portal.

Alternatively, the member may elect to receive a paper copy of the pension estimate package by mail. The member acknowledges that delivery by mail may result in delays and carries inherent risks related to loss or misdirection beyond UAPP's control.

By selecting a delivery method, the member confirms their preference and acknowledges the associated risks and limitations of the chosen method.

Member agrees to receive documents via secured messaging in portal Member requests a paper copy by mail

Employers must submit the completed Pension Estimate Request Form by attaching it to the member's record in *eePOINT* and creating the retirement estimate case.