# University of Victoria

**Application for Pension Estimate**

**Pension Services**  
Michael Williams Building Rm B278  
University of Victoria  
PO Box 1700 STN CSC  
Victoria BC V8W 2Y2  
Telephone: (250) 721-7030  
Fax: (250) 853-3854  
Email: pensions@uvic.ca

If you are considering retirement within the next 5 years and would like an estimate of your pension from the UVic Staff, Combination and/or Money Purchase Pension Plans, please complete and submit this form to Pension Services. Email is not a secure form of communication. Please do not email the form unless you password protect the attachment and phone us with the password.

### SECTION 1 – Member Information

<table>
<thead>
<tr>
<th>Surname</th>
<th>Given Name(s)</th>
<th>Employee ID#: V00________</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

<table>
<thead>
<tr>
<th>Mailing Address</th>
<th>Date of Birth</th>
<th>Telephone: (__<em>) <em><strong>-</strong></em></em></th>
</tr>
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### SECTION 2 – Spouse’s Information (if applicable)

<table>
<thead>
<tr>
<th>Surname</th>
<th>Given Name(s)</th>
<th>Date of Birth</th>
<th>Employee ID# or Pension ID # (if your spouse is also a member of a UVic pension plan):</th>
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### SECTION 3 – Pension Estimate Dates

Pension estimates are only done for Pension Start Dates that are within the next 5 years. If your Pension Start Date is within three months, we will include the forms required to make a benefit selection.

**Last Day of Pay:** 01 DD MM YYYY  
**Pension Start Date:** 01 DD MM YYYY

**Please note:** Pensions are paid on the first of each month. The earliest Pension Start Date is 1st of the month after your Last Day of Pay AND minimum of age 55. Your Last Day of Pay should, therefore, be as close as possible to the end of the month to avoid a gap between employment and pension income. Your last day of pay may be after your last day at work if you plan to use accrued vacation or other paid leave prior to your retirement date.

### SECTION 4 – Additional information relevant to your pension estimate

Please check if any of the following situations apply to you, as they have a material impact on the information we provide. Please allow up to 4 weeks for the calculation to be completed.

**Do you have a former spouse who is entitled to a portion of your pension?**  
☐ Yes  ☐ No

(If yes, submit a copy of your separation agreement or court order to Pension Services if not already on file)

**Do you have entitlements under more than one UVic pension plan?**  
☐ Yes  ☐ No

Select actual retirement ☐ or estimate ☐

**Where would you like the package sent?**  
☐ Home address  ☐ My Department: _________________________

### SECTION 5 – Authorization by Member

<table>
<thead>
<tr>
<th>Signature of Member:</th>
<th>Date: DD/ MM/ YYYY</th>
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</table>

This section is for internal use only  
Received:  
Staff _____ Combination _____ Money Purchase _____  
Due: DD MM YYYY

Notes:

The Plan document and applicable acts and regulations shall govern in the event of a question or dispute that may arise with the printed contents of this form.