

PENSION VALUATIONS (FOR WRONGFUL DEATH CASES) DOCUMENTS & INFORMATION REQUIRED

This information is required for both the deceased and the surviving spouse

1. Dates of birth and date of death.
2. Anticipated date of retirement, both absent the accident and as a result of the accident.
3. Anticipated date of receipt of Canada Pension Plan benefits, both absent the accident and as a result of the accident.
4. Copies of Canada Pension Plan statements for both spouses.
5. Current annual or monthly amount of the survivor's benefits.
6. Union affiliation, job classification/title, and/or job code, if any.
7. Name of the pension plan (e.g., IWA, RCMP, Superannuation - Federal).
8. Spouses' hire dates and dates of entry into the pension plans.
9. Is/was the deceased/spouse employed full-time or part-time? If employed part-time, how many hours per week does/did the deceased/spouse work? How many hours per week is considered full-time?
10. Year-end pension statements: for the deceased, for the year prior to and the year of the death; for the spouse, starting from the year prior to the accident and for each subsequent year up to the valuation date.
11. If the deceased and/or spouse was/is a member of the Superannuation Plan, a copy of the "Integrated Pension Administration System Personal Profile" will provide us with most of the information which we require.
12. A current copy of each person's pension plan benefit booklet containing descriptions of the pensions plans and pension benefit formulae.
13. A current copy of each person's pay scales, if applicable, from the accident date to the valuation date.
14. The name and contact telephone number of the pension plan administrator.
15. If required, signed authorization from the individual to allow the plan administrator to release information and/or documents.
16. RRSP statements for both spouses at the time of the death and copies of the surviving spouse's RRSP statements since the death and up to the most recent date prior to the valuation date.
17. Any documents showing the transfer of RRSP funds from the deceased to the surviving spouse.
18. The anticipated date of use (i.e., at age 60, 65 or other retirement date) of the RRSP annuities, both absent the accident and as a result of the accident.