

Select Info *to* Know

How to Prove Your Spousal Relationship



As a member of OPTrust Select, your married or common-law spouse may be entitled to survivor benefits when you die. Before paying any benefits to your spouse, OPTrust will need to confirm that your spousal relationship meets the Plan's requirements.



When does OPTrust need proof of my spousal relationship?

You or your spouse will need to provide proof of your spousal relationship when you:

- end your employment
- retire
- die



What documents does OPTrust need to help confirm my spousal relationship?

To help OPTrust determine whether your spouse qualifies for survivor benefits, we will need one (1) of the following documents to be completed:

- ✓ a **Confirmation of Marital Status** (this is included in the Pension Option Election package members receive when they end their membership in the Plan or retire)

OR

- ✓ a **Declaration of Spousal Relationship** (S1059) completed by your spouse if you die before you retire

Continued on next page.



Along with one of the forms listed above, OPTrust will also need the following documents:

If you are legally married:

- ✓ a copy of your marriage certificate if not already on file with OPTrust

If you have been living together in a common-law relationship for less than 3 years and are the parents of a child:

- ✓ A copy of a birth certificate or adoption papers for your child naming you both as parents
- ✓ One (1) document from the list below

If you have been living together in a common-law relationship for 3 years or more:

- ✓ Two (2) documents from the list below. One (1) of the two documents must be dated at least 3 years before your membership in the Plan ends.



List of common-law proof documents

- Copies of joint mortgage statements, property tax assessments, property or auto insurance or rental/lease agreements in both names for the shared address
- Copies of utility bills (e.g., hydro, water, gas, cable, telephone, internet) in both names for the shared address
- Copies of account statements (e.g., bank account, credit card, line of credit) in both names
- A legal will naming the other as spouse or partner
- Statements identifying either of you as the other's spouse under health/dental benefit plans, life or auto insurance policies, other pension plans or investment accounts (e.g., RRSP, TSFA)
- A valid Power of Attorney, naming the other as attorney and spouse or partner
- A Member Spousal Information and Beneficiary Designation form (S1015) on file with OPTrust that names the same spouse.

OPTrust may request more information or consider documents other than those listed above.



For more information

This information is a summary of certain benefits offered by OPTrust Select and is not applicable to the primary schedule of the OPSEU Pension Plan. All information is current as of the date of publication.

How to Reach Us

OPTrust
1 Adelaide Street East, Suite 1200
Toronto, ON M5C 3A7

Member Experience
Tel: 416-681-3609 in Toronto
1-833-678-7528 toll-free in Canada

www.optrustselect.com | email@optrustselect.com

