

## REQUEST FOR DESIGNATION AS LIMITED MEMBER

### *When to Use this Form*

A Form P2 is used any time a spouse's share of the benefits remains in the plan/annuity to be administered. The spouse becomes a kind of member/annuitant, with respect to the benefits, called a "limited member" and is entitled to receive a proportionate share of

- payments under a pension that has commenced,
- benefits under a defined benefit provision before pension commencement,
- disability benefits under a plan
- annuity payments,
- benefits that are subject to an original order or agreement made before Part 6 of the Family Law Act came into force, and
- benefits in a defined contribution account, if the administrator consents to the spouse's proportionate share remaining in the plan.

Form P2 is used in every case for dividing benefits except where benefits in a defined contribution account are being transferred from the plan, when a Form P3 is required.

[Please print]

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**To: Administrator of plan/annuity issuer**

Name of  
plan/annuity MOVEUP – FORTISBC PENSION PLAN

Address of administrator/annuity  
issuer.....  
16705 Fraser Highway, Surrey BC V4N 0E8

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**From: Spouse of member/annuitant** [Note: "spouse" includes a person who has lived in a marriage-like relationship with the member/annuitant for a continuous period of at least two years and also includes a former spouse.]

Name of spouse.....

Address .....

.....

Email address .....

Telephone (home) ..... (work) .....

Social Insurance Number .....

Date of birth .....

**In relation to: Plan member/annuitant**

Address .....

Email address .....

Telephone (home) ..... (work) .....

Social Insurance or Plan Identity Number .....

Employer .....

An administrator/annuity issuer is entitled to charge a fee to register a spouse as a limited member of \$750 (or \$925 if the benefits are in a hybrid plan).

I request that \_\_\_\_\_, [name of spouse] be designated as a limited member with respect to the benefits/annuity.

The following applies to a spouse who becomes a limited member:

- for a pension, disability benefits or an annuity that is being paid, this form will also act as a request for the administrator/annuity issuer to pay the limited member his or her proportionate share of those payments;
- for benefits if the pension has not commenced, the administrator will advise the limited member about his or her options for receiving a separate pension, or, in some cases, a transfer of his or her proportionate share from the plan in a lump sum. The limited member may exercise those options by filing a Form P4;
- for benefits in a defined contribution account, the limited member will be entitled to have his or her proportionate share transferred to a separate account in the plan, if the administrator consents.

Signed..... [*This is normally signed by the spouse but may be signed by the member under section 113 (2) of the Family Law Act.*]

Date .....

Signed (witness to signature)

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Name of witness

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Address of witness

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