



# Member Request for a Past Service Purchase Estimate

*Revised April 2005*

Date Received (for HOOPP use only)

## 1 Member Information

Please read the Instructions page before you proceed. Please print. *(You can complete this form without involving your employer.)*

Name:  Miss  Mrs.  Ms.  Mr.  Sister  Dr.

\_\_\_\_\_  
(Last Name) (First Name) (Middle Initial)

If your surname was different during the period of past service you are applying to purchase, please provide that name:

Social insurance number (SIN): |\_|\_|\_|\_| • |\_|\_|\_|\_| • |\_|\_|\_|\_|

Mailing address:

\_\_\_\_\_  
(Number) (Street) (Apt. No.)

\_\_\_\_\_  
(City) (Province) (Postal Code)

Home telephone: ( ) - Work telephone: ( ) -

Name of current employer: \_\_\_\_\_

## 2 Eligible Periods of Past Service

Indicate the period(s) of past service you're applying to purchase.

A period when you were employed by a HOOPP employer, but were not enrolled in the Plan.

From \_\_\_\_\_ to \_\_\_\_\_ HOOPP employer during this period: \_\_\_\_\_

Employer-approved leaves From \_\_\_\_\_ to \_\_\_\_\_

Service with a predecessor employer that now participates in HOOPP

From \_\_\_\_\_ to \_\_\_\_\_

Former service in HOOPP From \_\_\_\_\_ to \_\_\_\_\_

Past service in another pension plan From \_\_\_\_\_ to \_\_\_\_\_

Prior service with a new participating employer From \_\_\_\_\_ to \_\_\_\_\_

## 3 Confirmation

I hereby certify that the information contained in this form is, to the best of my knowledge, correct.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

SEND ORIGINAL TO HOOPP

MAKE ONE COPY FOR YOUR FILES

HOOPP, 1 Toronto Street, Suite 1400, Toronto ON M5C 3B2

Tel: 416-369-9212 Toll free: 1-888-333-3659 Fax: 416-369-0225

Website: www.hoopp.com E-mail: clientservices@hoopp.com

# Instructions

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The periods of service that you may now qualify to purchase – if you're an active, contributing member of HOOPP – are described below.

- **A period when you were employed by a HOOPP employer, but were not enrolled in the Plan:** This can include a waiting period.
- **Employer-approved leaves:** This includes any type of employer-approved leave for which you didn't make contributions to HOOPP. It also includes any time you lost due to a temporary layoff, strike or lockout, emergency leave, or when you were on loan to another employer and didn't make HOOPP contributions, subject to certain conditions. (If, however, you contributed to another pension plan during the period when you were on loan, the Income Tax Act requires that the benefit either be transferred into HOOPP or withdrawn from the other plan.) Periods when you were receiving free accrual while disabled are not available for past service purchase because HOOPP credited you with contributory service during such situations.
- **Service with a predecessor employer that now participates in HOOPP:** This includes "non-pensionable" periods of service with a predecessor employer (such as a waiting period for your former pension plan) if the successor employer now participates in HOOPP. This feature may be of interest if you joined HOOPP under a divestment – a sale, assignment, or disposition of business – or if you joined HOOPP as a result of a merger.

- **Former service in HOOPP:** This is service, before your current period of Plan membership, for which you received a termination benefit from HOOPP.
- **Past service in another pension plan:** This includes service with a pension plan that you used to belong to and which became part of HOOPP or entered into a reciprocal transfer agreement with HOOPP after you received a termination benefit from the other plan. For pre-1992 service, the Income Tax Act requires that funds be transferred directly from the other pension plan.
- **Prior service with a new participating employer:** If you work at an organization that now participates in HOOPP, but previously didn't, the period of continuous service you had before the organization joined the Plan may be eligible for past service purchase. One of two conditions must have occurred – either the employer didn't previously offer a registered pension plan or, if it did, you didn't belong to it.

Once you complete this form and return it to HOOPP, you will receive a past service purchase estimate, along with a form you can use to request a formal past service purchase quote. The quote will require the involvement of your employer (or past HOOPP employers) as the periods eligible for purchase will have to be confirmed with the employer(s). The quote will provide details on payment options.