



I am registering for the first time

I am changing my personal data

This form is available on our website www.atrf.com. You must complete both sides of this form for your information to be updated. You may mail or fax your completed form to ATRF.

Personal Information

Ms. Miss Mrs. Mr. Dr.

(please print)

Complete this section for a change of address.

If you have not done so recently, please also complete the 'Designating a Beneficiary Form'.

Name Last First Initial
Social Insurance Number
Previous Last Name (if applicable)
Address Street
City
Province Postal Code
Gender Female Male
Date of birth: YYYY/MM/DD
Telephone Home
Telephone Work
Personal E-mail Address

Adding a Pension Partner

Pension Partner Information (see below for definition)

Complete this section to add a pension partner.

To calculate your benefit entitlements, ATRF needs to know if you have a spouse/pension partner and if so, his/her date of birth.

If you and your pension partner are both members of the plan, we require your pension partner's SIN and each of your signatures to authorize a change of address for both members.

Name Last First Initial
Gender Female Male
Date of birth: YYYY/MM/DD
Address Street
Telephone
City
Province Postal Code
Pension partner's personal email address
Pension partner's SIN number
Pension partner's signature Date YYYY/MM/DD

Definition of Pension Partner:

- (i) a person who, at the relevant time, was married to that member and had not been living separate and apart from that member for 3 or more consecutive years, or
(ii) if there is no person to whom subclause (i) applies, a person who, as at and up to the relevant time, had lived with that member in a conjugal relationship for a continuous period of at least 3 years and was, during that period, held out by that member in the community in which they lived as being in that conjugal relationship.

Definition of Living Separate and Apart:

- Persons are living separate and apart
(a) if they are living separate and apart and either of them has the intention to live separate and apart from the other, or
(b) if,
(i) they had been living separate and apart,
(ii) the separation was interrupted or ended by reason only that either of them became incapable of continuing to live separate and apart or of forming or having the intention to continue to live apart of that person's own volition, and
(iii) the separation would probably have continued if that person had not become so incapable.

Removing a Pension Partner

Complete this section to remove a pension partner.

Note: Updating your pension partner information does not remove a pension partner's entitlement to a portion of your benefit entitlement under the Plans. In addition, your pension partner will not be removed until all supporting documentation is received by ATRF.

Indicate the reason you are removing your pension partner. Please note, additional information may be required.

- Death (Death Certificate enclosed)
- Married, but living separate and apart (note: your pension partner will remain entitled to death benefits until you have been separated three or more years)
- Divorce (Divorce Certificate enclosed)
- Common-law relationship has dissolved (Participant Declaration that a Common-law Relationship has Dissolved statutory declaration enclosed)

Date of event: _____
YYYY/MM/DD

Former Pension Partner's Name *Last* *First* *Initial*

Your Signature

Signature

Date _____
YYYY/MM/DD

IMPORTANCE OF REGISTERING AS A NEW MEMBER

The Alberta Teachers' Retirement Fund (ATRF) maintains information about your ATRF contributions, your pensionable salary and years of service. This information will be used to calculate a benefit for you. In order to provide an annual plan member statement, newsletters and other updates, ATRF needs your current address and personal information.

WHY DOES ATRF REQUIRE CERTAIN SPECIFIC INFORMATION?

The information is used to prepare your individualized Plan Member Statement, which contains your most current benefit entitlements, and benefits that would be paid on your death. It is sent to you annually, after your employer has finished reporting to ATRF for each school year. You can obtain a statement anytime by accessing your personal data online through *MyPension* or by contacting ATRF.

We encourage members to update their personal details online. However, you can also use this form to report an **address change**. Please ensure you notify your employer of any changes because your employer reports your address to ATRF with each monthly payroll submission. If your employer still has your previous address, that information will override any change made by ATRF or by you online.

Name changes cannot be reported online. You must complete this form and submit it to ATRF. If your name has changed as a result of marriage, please send ATRF a copy of your marriage certificate. If you have changed your name for reasons other than marriage, we will require a copy of your legal change of name document. See below for further information.

If you wish to change your beneficiary, you must complete an ATRF **Designating a Beneficiary** form.

REQUIRED DOCUMENTS

When ATRF pays you a benefit, we require certain documents to verify your eligibility. To eliminate the need to provide them later, we encourage you to send ATRF a copy of your birth certificate, drivers' license, or Canadian passport, your marriage certificate or other change of name document, and a copy of your pension partner's birth certificate, drivers' license, or Canadian passport.