

Instructions

The following instructions are designed to help you complete the Retirement Notice for the Healthcare of Ontario Pension Plan (HOOPP).

This form should be used for members applying for early, normal, or postponed (after age 65) retirement. It is also used for disability retirement. Don't use it for retired members who re-enrolled in the Plan, resumed contributions, and now want to start collecting their pension again. To handle that situation, use a Pension Resumption Form. For more information on retirement, refer to Section 7 of the online HOOPP Administration Manual.

1. Member Information

- Provide the member's mailing address, home and work (if applicable) telephone numbers, fax number, and e-mail address. Please indicate the member's language preference.
- Proof of age for the member and, if applicable, the member's spouse is necessary to determine when the member qualifies to retire; age may also affect the size of the pension he or she will receive. HOOPP will ask the member for proof of age if it has not already been provided. HOOPP will accept one copy of a valid Canadian passport, birth certificate, baptismal certificate, citizenship papers, or a valid Canadian driver's licence. Alternatively, HOOPP will accept a copy of any two of the following documents: a valid foreign passport, an expired Canadian passport, an Ontario picture health card, Canadian immigration papers, marriage records, or an Ontario age of majority card. If none of these documents can be obtained, HOOPP will accept a statutory declaration of the member's age, made before a judge, lawyer, commissioner of oaths, or notary public.

2. Spousal Information

- Indicate whether or not the member has a qualifying spouse. If you know the spouse's name, social insurance number, and address (if different from the member's), please provide it in this section. If this information is not known, leave this part of the section blank.
- A qualifying spouse is someone who, at the time a determination is required:
 - is legally married to the member, but not separated from the member;
 - has been living with the member continuously in a conjugal relationship for at least a year, or
 - is the mother or father (natural or adoptive) of the member's child, and lives with the member in a relationship of some permanence.
- A member's qualifying spouse is the primary beneficiary for HOOPP benefits, unless entitlement to spousal benefits has been waived. If there is no spouse, or a waiver has been signed, the primary beneficiary can be any person, persons, or organization the member names. Members whose spouse is their primary beneficiary should also name a secondary beneficiary the person, persons, or organization they want to receive any benefits after both the member and surviving spouse have died.
- A member who has no spouse should name a non-spouse beneficiary, otherwise, any benefits payable upon the member's death will go to his or her estate.

3. Declaration

- By signing the declaration, the member is acknowledging his or her retirement date, which is also his or her termination of membership date. HOOPP pensions usually begin on the first of the month following the retirement date.
- Signing the declaration also means the member is aware of HOOPP's rules regarding the privacy of personal information.
- A non-spouse beneficiary can be changed at any time via a Beneficiary Designation Form.

4. Employment Information

- Indicate the member's retirement date.
- Two additional points to be aware of:
 - If the member participates in HOOPP at more than one employer, he or she cannot receive a pension from HOOPP until membership in HOOPP has been terminated at all the HOOPP employers where the member works.
 - If, after retirement, a member returns to work with a HOOPP employer, he or she has the option of temporarily stopping the HOOPP pension, re-enrolling in the Plan, and resuming HOOPP contributions. More information on the re-enrolment provision can be found in Section 7 of the online HOOPP Administration Manual or on the hoopp.com website.
- If the member was off work on a leave or other absence, and this period has not already been reported to HOOPP, this information – as well as any contributions made – must be reported via a Service, Earnings, and Contributions Report.
- Indicate, by ticking the appropriate box, whether or not this form is being submitted to support a disability retirement. Your organization will be asked to complete this form if HOOPP has approved the member for a disability pension. You will also need to provide final pension information via a Service, Earnings, and Contributions Report, which can be attached. For more on disability retirement see Section 8 of the online HOOPP Administration Manual.

5. Employer Information

- By completing this form, you are certifying that the information contained in it is correct to the best of your knowledge.
- Provide contact information, your name, title, telephone number, business fax, and e-mail address, in case we have any questions about this form.

6. Returning this form

- Return this form to HOOPP. Barcodes cannot be read if the form is sent by fax. If you are printing this form, please do not reduce it in size or fold it.