

## UPP Authorization to Release Information to a Third Party

You can use this form to authorize University Pension Plan Ontario (UPP) to disclose your personal information and to discuss any matters related to your UPP pension benefits to the third-party contact you designate below. This could include, for example, a financial or legal advisor. Third-party contacts may not make decisions on your behalf, and you are only authorizing UPP to allow them to receive, retain, access and discuss your personal and pension information with UPP. For further information, please refer to the **frequently asked questions** on the next page.

Once you have completed this form, please return it to UPP Member Services via Secure Message through the **myUPP Member Portal**.

Member information			
First name	Middle name	Last name	
Member ID or Employee ID	Personal phone number	Personal email address	
Home address			
City	Province	Postal code	Country

Third-party information			
First name	Last name		
Organization (if applicable)			
Phone number	Email address		
Address			
City	Province	Postal code	Country

Authorization	
<p>I authorize UPP to disclose my personal information and discuss any matters relating to my UPP pension benefits to the authorized third party indicated above. I understand that:</p> <ul style="list-style-type: none"> <li>• UPP does not control how the third party stores and retains the information shared with them.</li> <li>• This authorization will remain in effect until I instruct otherwise, or until the expiry date I indicate below.</li> </ul>	
Expiration date of authorization, if applicable (mm/dd/yyyy):	
Member's signature	Date of signature (mm/dd/yyyy)

## Frequently asked questions

### What is considered personal information?

Personal information includes (but is not limited to):

- Identifiers such as your name, social insurance number, and employee number;
- Demographic information, such as your date of birth and marital status;
- Contact information including your home address, email address and phone number(s);
- Financial information, such as your pensionable earnings, pension amounts, tax information and banking information;
- Plan administration information, such as your membership status, the name of your employer, powers of attorney and other legal documents, and the names of your spouse, children, or other beneficiaries;
- Any other information you've provided to UPP.

### Who is considered a third-party contact?

A third-party contact could include a financial or legal advisor, organization, a spouse or other family member.

### What permissions are granted to the third-party contact?

They can contact UPP without you being present to discuss your personal pension information and request copies of your pension-related documents such as your annual pension statements.

They cannot make decisions or sign forms on your behalf and cannot access your personal myUPP Member Portal account.

**Important:** To keep your information secure, you should never share your myUPP Member Portal credentials with another party.

### What if I need a third party to complete forms or make decisions on my behalf?

If you require assistance from a third party to sign forms or update your information on your behalf, you must submit a Power of Attorney for Property or a General Power of Attorney. For details, please visit [ontario.ca/page/make-power-attorney](https://www.ontario.ca/page/make-power-attorney).

### Can I revoke this authorization?

Yes, you may revoke this authorization at any time by contacting UPP Member Services. You can also indicate an expiry date on the form if you wish to end the authorization on a specific date.

### Learn more

For more information about how UPP discloses your personal information, please see our [Privacy Statement](#) on [myupp.ca](https://myupp.ca).

If you have any questions, UPP Member Services is available via Secure Message through the **myUPP Member Portal**, or phone at 1-833-MBRS-UPP (1-833-627-7877) from Monday – Friday, 8:30 am to 5 pm ET.