

UPP Pension Transfer-in Application

Transferring service from a prior plan to University Pension Plan Ontario (UPP) allows members to consolidate pension benefits into a single plan. Use this form to initiate the process of transferring the funds from your prior registered pension plan to UPP.

By completing this form, you are authorizing UPP to collect information about your pension entitlement with a prior plan in order to prepare your transfer-in options. Once UPP receives the information, we will calculate the equivalence of your prior service into UPP service.

This form does not constitute a commitment to complete the transfer. You can decide whether you wish to proceed with the transfer when you receive your *UPP Transfer-in Options Package*. The funds will be used to provide you with additional service under UPP, which may allow you to retire earlier and/or with a larger pension.

Eligibility conditions and key dates:

You may be eligible to transfer all or a portion of the value of your pension entitlement to UPP if all of the following conditions apply:

- your previous employer's plan is a Canadian registered pension plan (RPP);
- your previous plan allows transfers to another RPP;
- you stopped being a member of your previous employer's pension plan within 12 months of becoming a member of UPP (or within 12 months of joining the university's prior plan, whichever is earlier); and
- you apply for the transfer within 12 months of becoming a member of UPP (or within 12 months of joining the university's prior plan, whichever is earlier).

How to complete this form:

- To initiate the transfer application process, complete sections A, B, C and D and return this form to UPP via Secure Message through the **myUPP Member Portal**. If you have not registered, visit myupp.ca to sign up in a few simple steps.

Next steps:

- If the eligibility conditions are met, UPP will contact your previous plan to request information about your pensionable service under that plan.
- UPP will then provide you with a *UPP Transfer-in Options Package* indicating how much UPP service you can receive with the funds transferred from your previous plan. This package will include further instructions should you wish to proceed with the transfer.

Important notes:

- The option to transfer service out of your prior plan may be time-limited based on their plan rules. Please ensure you follow any deadlines your prior plan may have if you wish to proceed with transferring service to UPP.
- Your prior plan may recalculate the value of the pension benefit available for transfer, based on changes in the interest rates and other assumptions. Any change in value may be an important factor in your transfer-in decision making process. Carefully review the termination options statement that your prior plan provided to determine when they will recalculate the value.
- UPP can only accept funds directly from another Canadian RPP to complete the transfer.

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Please complete sections A, B, C and D below and return this form to UPP via Secure Message through the **myUPP Member Portal**.

A. Member information			
First name	Middle name	Last name	Date of birth (mm/dd/yyyy)
Home address			
City	Province	Postal code	Country
Personal phone number		Personal email	
Employee number		Current employer	
Indicate if you are faculty or staff		Hire date (mm/dd/yyyy)	
UPP enrolment date (mm/dd/yyyy)		Previous employer	

B. Previous pension plan information		
Note: Please provide your previous pension plan's information below, not your employer's. This information can be found on the pension termination documents you received from your previous pension plan.		
Name of previous pension plan	Date of termination from previous plan (mm/dd/yyyy)	
Mailing address		
City	Province	Postal code

C. Previous pension plan's contact person information		
First and last name	Email address	Phone number

D. Authorization and consent for information	
I authorize my previous pension plan to provide UPP with my service, salary, and any other pension information required to provide options to transfer funds from my previous pension plan.	
Member's signature	Date (mm/dd/yyyy)

Privacy note: By completing this form you authorize your personal information to be collected, used, and shared by and between UPP, any agents, delegates or service providers and participating employers, and as otherwise provided in the UPP Privacy Statement, all in accordance with the UPP Privacy Statement and applicable law. The UPP Privacy Statement is available on the [UPP website](#).