



UBC FACULTY PENSION PLAN
Voluntary Contribution Form

Name \_\_\_\_\_ Employee ID No \_\_\_\_\_
Surname First Name Middle Initial
Home Address \_\_\_\_\_
Number Street City Province Postal Code
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_ Email Address \_\_\_\_\_

VOLUNTARY CONTRIBUTIONS

I wish to make voluntary contributions by way of payroll deduction in the amount of \$ \_\_\_\_\_ per pay cheque,
starting \_\_\_\_\_ and ending \_\_\_\_\_.
mmm/dd/yyyy mmm/dd/yyyy (enter n/a if you are not electing an end date)

Note: This form must be received by the Pension Administration Office 10 calendar days in advance of the start date.
For example: A request to start on the September 15, 2019 pay cheque must be received by September 5, 2019.

AUTHORIZATION

I understand the following:

- 1. I am responsible for complying with the maximum limit on contributions to a Registered Pension Plan as set out under the Income Tax Act.
2. Should my salary or appointment change during the calendar year, my voluntary contribution room will be affected.
3. If the total voluntary contributions nears the maximum, the voluntary contributions by payroll deduction will be stopped for the remainder of the calendar year. The payroll deduction in the amount stated above will be reinstated in January of the following calendar year, if applicable.
4. If the voluntary contributions cause my total contributions to the Plan to exceed the annual maximum limit, the Trustees are required to refund the excess voluntary contributions.
5. Any voluntary contributions I make to the Plan will be invested in accordance with my existing investment allocation choice(s) for my required contributions.
6. If I wish to stop my voluntary contributions at anytime, I must inform the Pension Administration Office in writing.
7. Voluntary contributions can be withdrawn in cash and will be subject to withholding taxes.

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

Pension Administration Office Use Only
Effective Date: \_\_\_\_\_ Date Processed: \_\_\_\_\_ By: \_\_\_\_\_