

## APPROVAL REQUEST RETURN FOR DEFINED BENEFIT PENSION PLAN TERMINATIONS

This return should be used to file an application seeking the Superintendent's authorization of the termination report for a defined benefit pension plan. For additional information, please refer to the Instruction Guide for Termination of a Defined Benefit Pension Plan which can be found on the Application and Approvals page in the Private Pension Plans section on the OSFI website.

1. Approval Type:
  
2. Termination date (YYYY-MM-DD):
  
3. Is this a designated plan as defined in section 8515 of the Income Tax Regulations?  Yes  No

**Note: Do not use the characters "#" or "&" in the name of any files being uploaded in the questions below.**

4. a) Approval Request Form for Termination of a Defined Benefit Pension Plan

"Please upload your file using the Browse button below"

File Upload:	<input type="button" value="Browse"/>
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- b) Termination Report

"Please upload your file using the Browse button below"

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- c) Actuarial Information Summary Form

"Please upload your file using the Browse button below"

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- d) Samples of the Initial Notification of Plan Termination (Form 2.1 of Schedule IV of the PBSR)

"Please upload your file using the Browse button below"

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- e) Samples of the Detailed Termination Statements (Form 2.2 of Schedule IV of the PBSR)

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5. Plus one or more of the following:

- a) Executed Plan Amendment

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AND

**b) Pension Plan Amendment Information Form (OSFI 594)**

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AND/OR

**c) Board Resolution**

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OR

**d) Letter indicating the Plan has terminated**

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**6. And, if applicable:**

**a) Plan Text**

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**b) Other documents and/or comments**

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SAMPLE