

McKeating Actuarial Services, Inc.

www.mckeating-actuarial.com

Contingent Tax Adjustment Report Checklist (Marriage Breakdown)

If the pension plan member was **NOT RETIRED** at separation, this is the information that is required in most cases:

- Statement of Family Law Value (FSCO Form 4) prepared by the pension administrator
- Regular annual pension statement for the year-end following and/or closest to the separation date
- Draft Net Family Property statement or other documentation of the member's RRSP and/or LIRA account balances as of the separation date
- Full year (January 1 to December 31) RRSP statements for the year of separation (or the year prior)

If the member **RETIRED** prior to separation, here's what we need:

- Statement of Family Law Value (FSCO Form 4) prepared by the pension administrator
- Confirmation of the gross amount of pension in the year of separation (T4A slip, notice of pension amount issued at the beginning of the year, or recent "pension paystub")
- Draft Net Family Property statement or other documentation of the member's RRSP and/or LIRA account balances as of the separation date
- Full year (January 1 to December 31) RRSP statements for the year of separation (or the year prior)

Occasionally, we will require additional information. If that's the case, we will let you know.

Questions? Not sure exactly what we require? Contact us:

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