



Statement of Family Law Value Former Plan Member with a Defined Benefit or a Combination Benefit FSCO Family Law Form 4D

Approved by the Superintendent of Financial Services pursuant to
the *Pension Benefits Act*, R.S.O. 1990, c. P.8

Read the User Guide before completing this form.

This form is to be completed by the pension plan administrator (Plan Administrator).

This form applies to a pension plan member who terminated employment or plan membership (Former Member) as of the Family Law Valuation Date and he/she has:

- a defined benefit under the pension plan; or
- a combination of a defined benefit and a defined contribution benefit under the pension plan.

This form does not apply to a pension plan member if the first installment of his/her pension was due (i.e. a Retired Member) on or before the Family Law Valuation Date.

This Statement of Family Law Value is a Statement of Imputed Value under the Ontario *Pension Benefits Act*.

Information for the Former Member (Deferred Vested) and the Spouse/Former Spouse of the Former Member

The Family Law Value that is specified under **Part A** of this Statement is the value of the pension that relates to the period of the spousal relationship (married or common-law) for the Former Member and the spouse/former spouse of the Former Member. If the Former Member and his/her former spouse proceed with the division of the Family Law Value, the former spouse of the Former Member must provide the Plan Administrator with a certified copy of a court order, family arbitration award or domestic contract that was made on or after January 1, 2012, and provides for the division and transfer of the Family Law Value. The information contained in the court order, family arbitration award or domestic contract must **clearly identify** the former spouse's share of the Family Law Value and the Family Law Valuation Date. The maximum amount that can be assigned to the former spouse of the Former Member is specified under **Part A** of this Statement.

The former spouse of the Former Member may request the transfer of his/her share of the Family Law Value by completing an **Application to Transfer the Family Law Value (FSCO Family Law Form 5)**, which must be accompanied by a certified copy of a court order, family arbitration award or domestic contract providing for the division of the Family Law Value, in addition to other documents as required by the Plan Administrator.

IMPORTANT: If the Former Member terminates employment or plan membership and his/her pension entitlement is paid out in full from the pension plan between the time this Statement is issued and the time the former spouse of the Former Member gives the completed **Application to Transfer the Family Law Value (FSCO Family Law Form 5)** to the Plan Administrator, the Plan Administrator is not required to transfer to the former spouse any amount related to his/her share of the Family Law Value.

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**Part A
Family Law Value**

Name of the Former Member	Last Name	First Name and Initials	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No
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Name of the Spouse/Former Spouse	Last Name	First Name and Initials	Applicant <input type="checkbox"/> Yes <input type="checkbox"/> No
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Appendix A of Application for Family Law Value (FSCO Family Law Form 1) was filed with two proposed Family Law Valuation Dates. THIS STATEMENT SETS OUT ONE OF THE TWO (2) PROPOSED FAMILY LAW VALUES.	<input type="checkbox"/> Yes <input type="checkbox"/> No
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The starting date of the spousal relationship is: _____ (yyyy/mm/dd)

The starting date is based on:

date of marriage date when the spouses/former spouses started living together in a common-law relationship date that was jointly chosen by the spouses/former spouses date specified in a court order or family arbitration award

The Family Law Valuation Date (Separation Date) is: _____ (yyyy/mm/dd)

The **Family Law Value** as of the **Family Law Valuation Date** is:

\$ _____ (defined benefit)

\$ _____ (defined contribution benefit) or N/A (enter 0 if N/A)

\$ _____ total

The **maximum amount** that may be assigned and transferred to the former spouse of the Former Member from the pension plan as of the **Family Law Valuation Date** is:

\$ _____ (defined benefit)

\$ _____ (defined contribution benefit) or N/A (enter 0 if N/A)

\$ _____ total

Note: Interest will be added to the former spouse's share of the Family Law Value from the Family Law Valuation Date to the beginning of the month in which the transfer is made, if:

(i) the former spouse's share is expressed as a proportion (i.e. percentage) of the Family Law Value in the parties' settlement instrument (court order, family arbitration award or domestic contract); or,

(ii) the former spouse's share is expressed as a specified amount and the settlement instrument explicitly requires that interest is to be paid on that amount.

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**Part B
Pension Plan Information**

Name of Pension Plan		Pension Plan Registration Number
Plan Administrator		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number ()	Fax Number ()	Website Address (if available)

**Part C
Former Member Information**

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)
Employee/Former Member Identification Number		

Contact Person Information for the Former Member

Yes N/A

Last Name	First Name and Initials	<input type="checkbox"/> Lawyer <input type="checkbox"/> Other <input type="checkbox"/> Power of Attorney
Name of Company/Firm (if applicable)		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number (Main) ()	Telephone Number (Other) ()	Fax Number ()
Contact Person E-Mail Address (if known)		

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**Part D
Spouse/Former Spouse of the Former Member Information**

Last Name	First Name and Initials	Date of Birth (yyyy/mm/dd)
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Contact Person Information for the Spouse/Former Spouse of the Former Member

Yes N/A

Last Name	First Name and Initials	<input type="checkbox"/> Lawyer <input type="checkbox"/> Other <input type="checkbox"/> Power of Attorney
Name of Company/Firm (if applicable)		
Mailing Address (Street Number and Name)		Suite/Floor No.
City	Province	Postal Code
Telephone Number (Main) ()	Telephone Number (Other) ()	Fax Number ()
Contact Person E-Mail Address (if known)		

**Part E
Transfer Options for the Former Spouse of the Former Member**

The following transfer options are available to the former spouse of the Former Member:

- Transfer lump sum to a locked-in retirement account (LIRA) or to a life income fund (LIF). [Note: The earliest date the former spouse may buy a LIF is anytime during the calendar year before the year he/she turns 55 years of age. Up to 50 per cent of the money that is transferred into the LIF may be withdrawn within 60 days of transferring the money to the LIF using FSCO **Form 5.2 – Application to Withdraw or Transfer up to 50% of the Money Transferred into a Schedule 1.1 LIF.**]
- Transfer lump sum to another pension plan. This option will only be available if the Plan Administrator of the receiving pension plan agrees to accept the transfer and administer the transferred amount in accordance with the Ontario *Pension Benefits Act*.
- Transfer to a Registered Retirement Savings Plan (RRSP), a Registered Retirement Income Fund (RRIF) or cash payment. This option is only available for a payment of a small amount, payment resulting from shortened life expectancy of the Former Member and/or payment of surplus.
- No transfer options are available because:

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Part F
Pension Fund Status

The **transfer ratio** of the pension plan for the purposes of this Statement is: _____

NOTE:

The "transfer ratio" is a term that is defined in section 1(1) Ontario Regulation 909 (General). The transfer ratio only applies to a defined benefit. The transfer ratio of a pension plan reflects the funded status of the pension plan as of a specific date. If the transfer ratio is less than 1.0, there may be limits on the Plan Administrator's ability to transfer the whole amount of the Family Law Value to the former spouse of the Former Member.

If the limits apply, the Plan Administrator would pay a first payment equal to the Family Law Value (updated with interest, if any) times the transfer ratio. The amount that remains is to be paid out within five years of the date of the first payment.

The transfer ratio of the pension plan may change over any given time period. The transfer ratio shown above may not reflect what the transfer ratio of the pension plan will be at the time when the former spouse of the Former Member makes an application to transfer his/her share of the Family Law Value. It is the transfer ratio of the pension plan on the date when payment is to be made to the former spouse of the Former Member that determines any limits on the payment.

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Part G
Certification by the Plan Administrator or Plan Administrator's Agent or Representative

A completed **Application for Family Law Value (FSCO Family Law Form 1)**, including all required documents and the fee (if any) was received on:

(yyyy/mm/dd)

I confirm the following:

- The pension plan provides only a defined benefit to the Former Member.
- The pension plan provides combination of a defined benefit and a defined contribution benefit to the Former Member.
- The Former Member applied for the withdrawal of his/her pension in circumstances of shortened life expectancy and the conditions that are specified under Ontario Regulation 287/11 (Family Law Matters) have been met [or, N/A].
- I have completed **Appendices A, D and E** of this Statement.
- I have completed **Appendix B**, or I have attached a separate sheet containing the required information relating to the plan provisions.
- I have completed **Appendix C**, or I have attached a separate sheet containing the required information relating to the actuarial assumptions.

I certify the following:

- I am the duly authorized Plan Administrator, or I am the duly authorized agent or representative of the Plan Administrator

I further certify that the information shown on this Statement (including all Appendices and any attachments) is, to the best of my knowledge, accurate and based on the information that was provided by the applicant in his/her **Application for Family Law Value (FSCO Family Law Form 1)** and the information contained in the pension plan records that pertain to the Former Member.

 Signature of Plan Administrator or Plan Administrator's authorized agent or representative

 Name of Plan Administrator or Plan Administrator's authorized agent or representative (printed)

 Dated (yyyy/mm/dd)

Information about the Plan Administrator's authorized agent or representative (if applicable)

Firm/Company Name			
Mailing Address (Street Number and Name)			Suite/Floor No.
City	Province	Postal Code	Telephone Number ()
E-Mail Address			

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Next Steps

No Division

If the Former Member and the spouse/former spouse of the Former Member **will not be dividing the Family Law Value**, they may jointly complete the **No Division of Family Law Value/Pension Assets (FSCO Family Law Form 7)** and give it to the Plan Administrator.

Transfer of the Former Spouse's Share of Family Law Value

If the **Family Law Value is to be divided**, the former spouse of the Former Member must complete and send an **Application to Transfer the Family Law Value (FSCO Family Law Form 5)** to the Plan Administrator and include the following information:

- A certified copy of the court order, family arbitration award or domestic contract made on or after January 1, 2012, under the Ontario *Family Law Act* that:
 - (i) provides for the division of the Family Law Value;
 - (ii) clearly specifies the amount that must be transferred to the former spouse; and,
 - (iii) clearly specifies the Family Law Valuation Date.
- Other information required by the Plan Administrator as noted below or attached (see attached).

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Appendix A

Plan Membership, Employment, Additional Voluntary Contribution and Excess Member Contribution Information as of the Family Law Valuation Date

Plan Membership and Employment Information as of the Family Law Valuation Date

The Former Member joined the pension plan on:	(yyyy/mm/dd)

The Former Member terminated employment or plan membership on:	(yyyy/mm/dd)

The Former Member became a retired member after the Family Law Valuation Date on:	(yyyy/mm/dd) or <input type="checkbox"/> N/A

Total credited service accrued by the Former Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date:	_____
Total credited service accrued by the Former Member during his/her spousal relationship period:	_____

Additional Voluntary Contributions (AVCs) Information as of the Family Law Valuation Date

The Former Member has made AVCs to the pension plan as of the Family Law Valuation Date.	<input type="checkbox"/> Yes (if Yes, complete information below) or <input type="checkbox"/> N/A
Total AVCs as of the Family Law Valuation Date, including interest/investment earnings:	\$ _____
If available, total AVCs from the starting date of the spousal relationship to the Family Law Valuation Date, including interest/investment earnings:	\$ _____

Excess Member Contributions as of the Family Law Valuation Date

The Former Member has excess member contributions in the pension plan as of the Family Law Valuation Date.	<input type="checkbox"/> Yes (if Yes, complete information below) or <input type="checkbox"/> N/A
Total excess member contributions, including interest/investment earnings remaining in the pension plan:	\$ _____

NOTE:

- Additional Voluntary Contributions (AVCs) are optional contributions that a pension plan member may make beyond those that are required to be made by the pension plan member under the pension plan. The terms of the pension plan specify whether AVCs are allowed and how they are to be paid out. **AVCs are not included in the Family Law Value** set out in **Part A** of this Statement.
- Excess member contributions arise in cases where a pension plan member's required contributions to the pension plan made on or after January 1, 1987, or an earlier date as specified in the pension plan, and interest/investment earnings on those contributions exceed one-half of the commuted value of his/her deferred pension earned after that date. The Former Member's **excess member contributions are not included in the Family Law Value** set out in **Part A** of this Statement.

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Appendix B

Explanation of Pension Plan Provisions that Apply to the Former Member as of the Family Law Valuation Date

Information about the pension plan is attached to this Statement.

Plan Provisions	Provide Details (If Applicable)
Plan type	<input type="checkbox"/> Single-employer Pension Plan <input type="checkbox"/> Jointly Sponsored Pension Plan <input type="checkbox"/> Other <input type="checkbox"/> Multi-employer Pension Plan <input type="checkbox"/> Individual Pension Plan
Benefit type	<input type="checkbox"/> final average earnings: final _____ of last _____ years <input type="checkbox"/> best average earnings: best _____ of last _____ years <input type="checkbox"/> career average earnings <input type="checkbox"/> flat benefit <input type="checkbox"/> other
Pension benefit formula (defined benefit)	
Canada Pension Plan/Old Age Security offset formula <input type="checkbox"/> N/A	
Canada Pension Plan/Old Age Security integration formula (and average YMPE used in the calculation) <input type="checkbox"/> N/A	
Normal retirement date	
Early retirement options	
Termination benefit	
Postponed retirement	
Pre-retirement death benefit	
Normal form of pension	
Ancillary benefits (bridging, supplemental, disability, etc.) <input type="checkbox"/> N/A	
Age when bridging or supplemental benefits end <input type="checkbox"/> N/A	
Consent benefits <input type="checkbox"/> N/A	
Minimum benefit formula <input type="checkbox"/> N/A	
Plan member contribution formula <input type="checkbox"/> N/A	
Indexation (pre-retirement) <input type="checkbox"/> N/A	
Indexation (post-retirement) <input type="checkbox"/> N/A	
Other relevant provisions <input type="checkbox"/> N/A	

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Appendix C

Actuarial Assumptions Used in the Calculation of the Family Law Value as of the Family Law Valuation Date

<input type="checkbox"/> Actuarial assumptions used in the calculation of the Family Law Value are attached to this Statement.	
Assumptions based on section 3500 of the <i>Canadian Institute of Actuaries Standards of Practice</i>	Assumptions
Non-indexed interest rate(s)	
Mortality table: <input type="checkbox"/> unisex and/or <input type="checkbox"/> sex-distinct (pre-87 service only)	
Indexed interest rate(s) <input type="checkbox"/> N/A	
Inflation rate(s) <input type="checkbox"/> N/A	
Marital status at retirement: percent married <input type="checkbox"/> N/A	
Marital status at retirement: age difference between plan members and their spouses <input type="checkbox"/> N/A	
Other relevant assumptions <input type="checkbox"/> N/A	

Shortened Life Expectancy

A shortened life expectancy application has been filed and the conditions that are specified under Ontario Regulation 287/11 (Family Law Matters) have been met. <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes", actuarial assumptions used in the calculation of the shortened life expectancy Family Law Value are provided below:	
Empty space for providing actuarial assumptions	

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Appendix D

Full or Partial Plan Wind Up/Surplus/Plan Amendments

Information about the full or partial wind up of the pension plan

The pension plan has been fully or partially wound up, the Former Member is included in the full or partial wind up group and the effective date of the full or partial wind up is **on or before** the date when this Statement is issued. If **Yes**, Yes N/A complete the information below.

The pension plan was wound up in full or in part

Effective date of the full or partial wind up of the pension plan is _____ (yyyy/mm/dd)

The full or partial wind up report is pending approval from the Superintendent of Financial Services Yes No, report has been approved

The Former Member's pension will be reduced as a result of the wind up Yes No Unknown

The pension plan is covered by the Pension Benefits Guarantee Fund Yes No

Surplus Application Made On or Before the Family Law Valuation Date

The Former Member is entitled to receive a share of surplus from the pension plan, which is not included in Family Law Value (see **Appendix E**). If **Yes**, provide relevant details of the surplus application (e.g. information about the surplus sharing agreement, etc.). Yes N/A

Pension Plan Amendments Before the Family Law Valuation Date

The Former Member belongs to a class of employees that received (or will be receiving) payment(s) resulting from amendment(s) to the pension plan related to cost of living adjustments during the last three fiscal years of the pension plan before the Family Law Valuation Date. If **Yes**, provide an explanation of the amendment(s) [e.g. date when amendment was made, how much the Former Member received (or will receive), etc.]. Yes N/A

Year 1	
Year 2	
Year 3	

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Appendix E

Worksheet for Family Law Value Calculations

Information About the Former Member's Defined Benefit as of the Termination of Employment or Plan Membership Date for Calculation 1

Accrued lifetime pension as of the Family Law Valuation Date <input type="checkbox"/> monthly or <input type="checkbox"/> annual	\$	
<hr/>		
Accrued bridging/supplemental benefits as of the Family Law Valuation Date <input type="checkbox"/> monthly or <input type="checkbox"/> annual or <input type="checkbox"/> N/A	\$	(enter 0 if not applicable)
<hr/>		
Canada Pension Plan reduction at age 65 or <input type="checkbox"/> N/A	\$	(enter 0 if not applicable)
<hr/>		
Former Member's age on the Family Law Valuation Date		

Step 1 – Calculation of Preliminary Value as of the Family Law Valuation Date

NOTE:

- The Preliminary Value of the defined benefit is the total value of the pension accrued by the Former Member during the period of his/her membership in the pension plan as of the Family Law Valuation Date. It has not been adjusted to reflect the period of the spousal relationship.
- The Preliminary Value of the defined contribution benefit is the total value of the defined contribution benefit with interest/investment earnings credited to the Former Member as of the Family Law Valuation Date. It has not been adjusted to reflect the period of the spousal relationship.
- Note that additional voluntary contributions or excess member contributions (see Appendix A of this Statement) are not included in the Preliminary Value.

Complete the applicable calculation(s):

- Complete **Calculation 1** if the Former Member **only has a defined benefit**.
- Complete **Calculations 1 and 2** if the Former Member has a **combination of a defined benefit and a defined contribution benefit**.
- Complete **Calculation 3** if the pension plan was **wound up in full or in part, the Former Member is included in the wind up group and the effective date of the wind up is on or before the Family Law Valuation Date**.

Calculation 1 - Preliminary Value of the Former Member's **defined benefit** as of the Family Law Valuation Date

Commutated value of the defined benefit as of the Family Law Valuation Date (excluding the commuted value of any ancillary benefits)	\$	
<hr/>		
Plus, the commuted value of any ancillary benefits as of the Family Law Valuation Date <input type="checkbox"/> N/A	\$	(enter 0 if not applicable)
<hr/>		
Initial Preliminary Value	\$	= G (defined benefit)
<hr/>		
Plus, surplus assets payable <input type="checkbox"/> N/A or <input type="checkbox"/> unknown	\$	= surplus (enter 0 if not applicable or unknown)
<hr/>		
Preliminary Value (defined benefit) as of the Family Law Valuation Date	\$	= G (defined benefit) + surplus
<hr/> <hr/>		

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Calculation 2 – Preliminary Value of the Former Member's **defined contribution benefit** as of the Family Law Valuation Date; or N/A (Note: For a defined contribution benefit, the following Sections also apply if the pension plan was wound up in full or in part, the Former Member is included in the wind up group and the effective date of the wind up is on or before the Family Law Valuation Date.)

Complete the applicable Section:

Section 1 - The Preliminary Value **can be determined** as of the Family Law Valuation Date N/A

Preliminary Value is the total amount of contributions, including interest/investment earnings on the contributions, attributable to the Former Member as of the Family Law Valuation Date	\$ _____	= G (defined contribution benefit)
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OR

Section 2 - The Preliminary Value **cannot be determined** as of the Family Law Valuation Date N/A

Preliminary Value is the total amount of contributions, including interest/investment earnings on the contributions, attributable to the Former Member as of the last day of the month immediately preceding the Family Law Valuation Date	\$ _____	= G (defined contribution benefit)
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Calculation 3 – Full or Partial Wind Up Yes N/A

A full or partial wind up of the pension plan was declared before this **Statement of Family Law Value (FSCO Family Law Form 4D)** was sent by the Plan Administrator to the Former Member and his/her spouse/former spouse.

The Former Member is included in the full or partial wind up group and the effective date of the wind up is **on or before** the Family Law Valuation Date.

Information about the Former Member's Accrued Pension (Defined Benefit) as of the **Full or** **Partial Wind Up Date**

Accrued lifetime pension as of the wind-up date <input type="checkbox"/> monthly or <input type="checkbox"/> annual	\$ _____	
Accrued bridging/supplemental benefits as of the wind-up date <input type="checkbox"/> monthly or <input type="checkbox"/> annual or <input type="checkbox"/> N/A	\$ _____	(enter 0 if not applicable)
Canada Pension Plan reduction at age 65 or <input type="checkbox"/> N/A	\$ _____	(enter 0 if not applicable)

Information about the Former Member's Preliminary Value (Defined Benefit) as of the Family Law Valuation Date

Wind up value of the pension as of the full or partial wind up date	\$ _____	
Plus, accumulated interest from the full or partial wind up date to the Family Law Valuation Date	\$ _____	
Initial Preliminary Value	\$ _____	= G (defined benefit)
Plus, surplus assets payable <input type="checkbox"/> N/A or <input type="checkbox"/> unknown	\$ _____	= surplus (enter 0 if not applicable or unknown)
Preliminary Value (defined benefit) as of the Family Law Valuation Date	\$ _____	= G (defined benefit) + surplus

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Step 2 – Calculation of Family Law Value as of the Family Law Valuation Date

NOTE:

- The Family Law Value is the portion of the Preliminary Value that relates to the period of the spousal relationship (married or common-law) as of the Family Law Valuation Date.
- The **account balance** in the calculations (for the defined contribution benefit) means the total amount of the contributions, including interest/investment earnings on the contributions that is attributable to the Former Member.
- The Family Law Value is the “imputed value” in the Ontario *Pension Benefits Act*.

Pick the ONE calculation that applies:

- Complete **Calculation 4** if the Former Member **only has a defined benefit**.
- Complete **Calculations 4 and 5** if the Former Member has a **combination of a defined benefit and a defined contribution benefit**.

Calculation 4 - Family Law Value of the Former Member's defined benefit as of the Family Law Valuation Date

The Preliminary Value calculated under Step 1 (Calculations 1 or 3) = G (defined benefit) + surplus	\$	

Total credited service accrued by the Former Member during his/her spousal relationship period (i.e. beginning on the starting date of the spousal relationship and ending on the Family Law Valuation Date) = H		_____
Total credited service accrued by the Former Member during his/her entire period of employment or plan membership as of the Family Law Valuation Date = J		_____
Family Law Value formula = [G (defined benefit) + surplus] x H/J* *H/J cannot exceed 1	\$	= Family Law Value (defined benefit)

Calculation 5 – Family Law Value of the Former Member's defined contribution benefit as of the Family Law Valuation Date
(Note: For a defined contribution benefit, the following Sections also apply if the pension plan was wound up in full or in part, the Former Member is included in the wind up group and the effective date of the wind up is on or before the Family Law Valuation Date.)

Complete the applicable Section:

Section 1 - The starting date of the spousal relationship is before the date when the Former Member joined the pension plan N/A

The Family Law Value = Preliminary Value G (defined contribution benefit) calculated in Step 1 (Calculation 2)	\$	
		= Family Law Value (defined contribution benefit)

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Section 2 - The **starting date** of the spousal relationship is **on or after the date** when the Former Member joined the pension plan N/A

Pick the calculation that applies.	Calculation 1: The account balance as of the starting date of the spousal relationship can be determined . <input type="checkbox"/> N/A		
	The Preliminary Value G (defined contribution benefit) calculated in Step 1 (Calculation 2) is:	\$	A
	The account balance at the starting date is:	\$	B
	A minus B is:	\$	= Family Law Value (defined contribution benefit)
	OR		
	Calculation 2: The account balance as of the starting date of the spousal relationship cannot be determined but the account balance can be determined on a date that falls between 45 days before and 45 days after the starting date of the spousal relationship. <input type="checkbox"/> N/A		
	The account balance can be determined as of:		(yyyy/mm/dd)
	The Preliminary Value G (defined contribution benefit) calculated in Step 1 (Calculation 2) is:	\$	A
	The account balance as of the determined date is:	\$	B
	A minus B is:	\$	= Family Law Value (defined contribution benefit)
	OR		
	Calculation 3: The account balance as of the starting date of the spousal relationship is being determined in accordance with section 18 of Ontario Regulation 287/11 with necessary modifications. <input type="checkbox"/> N/A		
	The Preliminary Value G (defined contribution benefit) calculated in Step 1 (Calculation 2) is:	\$	= G
	The period of spousal relationship (i.e. beginning on the starting date and ending on the Family Law Valuation Date) is:		= H
	The entire period of employment or plan membership as of the Family Law Valuation Date is:		= J
Family Law Value formula is G X H/J* *H/J cannot exceed 1	\$	= Family Law Value (defined contribution benefit)	

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Step 3 - Maximum Amount that May Be Assigned and Transferred to the Former Spouse of the Former Member as of the Family Law Valuation Date

The share of the Family Law Value payable to the former spouse of the Former Member **cannot exceed 50%** of the **Family Law Value (defined benefit)** and **cannot exceed 50%** of the **Family Law Value (defined contribution benefit)**.

Under Step 2 (Calculation 4) the Family Law Value (defined benefit) is:	\$	

The maximum amount of the Family Law Value (defined benefit) that may be assigned and transferred to the former spouse of the Former Member from the pension plan is:	\$	= maximum (defined benefit)

Under Step 2 (Calculation 5) the Family Law Value (defined contribution benefit) is [or <input type="checkbox"/> N/A] :	\$	(enter 0 if not applicable)

The maximum amount of the Family Law Value (defined contribution benefit) that may be assigned and transferred to the former spouse of the Former Member from the pension plan is [or <input type="checkbox"/> N/A] :	\$	= maximum (defined contribution benefit) (enter 0 if not applicable)

The total maximum amount of the Family Law Value [defined benefit and defined contribution benefit (if applicable)] that may assigned and transferred to the former spouse of the Former Member from the pension plan is:	\$	= maximum (defined benefit and defined contribution benefit)
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