

AMENDMENTS TO PENSION PLANS AND TO DOCUMENTS THAT CREATE OR SUPPORT THE PLAN OR THE PENSION FUND

In order to file an amendment, please complete and upload either OSFI 593: Defined Contribution Pension Plan Text Amendment Information Form or OSFI 594: Defined Benefit/Combination Pension Plan Amendment Information Form and all other relevant documents. The forms, as well as guidance on making and filing amendments, are available in the Guidance by Topic area for Defined Benefit or Defined Contribution plans, under the topic Amendments.

An amendment that is made to the plan text or to any document that creates or supports the plan or the pension fund must be filed within 60 days after it is made.

Amendments requiring the Superintendent's authorization (e.g. a void amendment under subsection 10.1(2) of the Pension Benefits Standards Act, 1985 (PBSA), an asset transfer under section 10.2 of the PBSA, or an amendment to a multijurisdictional plan requiring authorization under provincial pension legislation) cannot be submitted via RRS. Documents in support of an application for the Superintendent's authorization should be submitted electronically to pensions@osfi-bsif.gc.ca.

1. Effective date of the amendment (YYYY-MM-DD):

2. Amendment number (if applicable):

3. Does the amendment concern (check all that apply):
- a) Change of Plan Name and/or Plan Sponsor Yes No
 - b) Change in Plan year end date Yes No
 - c) Change of the Pension Fund Custodian Yes No
 - d) Changes to benefits or contributions Yes No

4. Amendment Information Form (OSFI 593 or OSFI 594) [Mandatory]

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5. Plus one or more of the following:
a) Plan Amendment

"Please upload your file using the Browse button below"

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b) Restated Plan Text

"Please upload your file using the Browse button below"	
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c) Trust Agreement

"Please upload your file using the Browse button below"	
File Upload:	<input type="button" value="Browse"/> *

d) Custodial Agreement

"Please upload your file using the Browse button below"	
File Upload:	<input type="button" value="Browse"/> *

e) Collective Agreement

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6. Plus, if applicable:

a) Board resolution/authorization of the amendment (if not included in another uploaded document)

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b) Other

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