



À votre service...pour le soin de votre avenir.

THE RETIRED TEACHERS OF ONTARIO

LES ENSEIGNANTES ET ENSEIGNANTS  
RETRAITÉS DE L'ONTARIO

Here for you now ... Here for your future.

Complete pages 1-3 of this form. >>>>>

## 2014 Application for Full or Associate Membership in RTO/ERO

GENDER  M  F MARITAL STATUS  Married  Partnered  Single  Widow(er)  Divorced

LAST NAME	FIRST NAME
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ADDRESS - STREET/BOX/R.R.	APT./UNIT NO.
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CITY	PROVINCE	POSTAL CODE
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TELEPHONE	EMAIL
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MEMBER'S DATE OF BIRTH DAY MONTH YEAR	SOCIAL INSURANCE NUMBER	DATE OF RETIREMENT DAY MONTH YEAR	PENSION START DATE DAY MONTH YEAR
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If your preferred membership start date is not immediate upon application, please indicate:

PREFERRED MEMBERSHIP START DATE DAY MONTH YEAR
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Please indicate your status by checking the appropriate box:

### FULL MEMBERSHIP

- Retired teacher/vice-principal/principal/superintendent/director receiving a pension from the Ontario Teachers' Pension Plan (OTPP)
- A retired teacher with a **minimum of 15 years** of credited service who opted for a commuted value\*\* transfer from the Ontario Teachers' Pension Plan following the OTPP rules in place at the time of commutation – please indicate Years of Credited Service

**OR**

### ASSOCIATE MEMBERSHIP

- Retired teacher receiving a pension from the OTPP, whose spouse is a Full member of RTO/ERO
- Retired teacher who opted for a deferred pension from the OTPP
- Retired teacher who opted for the commuted value\*\* of his/her contributions to the OTPP (**less than 15 years** of credited service)
- Surviving spouse, of a **Full or Associate member**, who is not eligible to receive a teacher's pension
- A retired certified teacher from a non-designated Ontario private school, licensed by the Ministry of Education in Ontario
- Non-educator **divorced** spouse of a Full or Associate member
- Retired educator or non-educator employee of a Canadian School Board or educational organization  
Job title:
- The spouse of a member, where the former (i.e. spouse) is not in receipt of a teacher's or survivor's pension.
- Individual, actively employed in education, who is not retired and will be eligible upon retirement to be a Full or Associate member

#### MANDATORY

DATE OF DEATH  
DAY MONTH YEAR

MEMBER SIN#

- Retired educator who is receiving a pension from the Ontario Public Service or the equivalent from a Canadian jurisdiction outside Ontario
- Retired educator receiving a pension from a University or College in Canada
- Retired teacher receiving a pension from a teacher's pension fund outside Ontario

EXPECTED RETIREMENT DATE (MANDATORY)  
DAY MONTH YEAR

This applies to individuals who are still working, wish to be a part of RTO/ERO prior to retirement and will be eligible to join when they retire.

\*\* Commuted Value: Transferring a lump sum of your OTPP pension to a LIRA, Life Annuity or another pension.

Please complete pages 1-3 of this form >>>>>

Remember to check the District of your choice and sign at the bottom of this page

My spouse/partner is an RTO/ERO member  YES  NO If YES, please provide membership #

If YES, would you prefer one mailing to your household?  YES  NO

I would prefer to receive information in  ENGLISH  FRENCH

I would prefer the Provincial magazine, *Renaissance* and newsletter, *Liaison* from RTO/ERO in (please choose one only):

ELECTRONIC FORMAT  OR  HARD COPY MAILINGS

Prior to retirement, I was a member of:

AEFO  CAAT  CAUT  CPCO  CUPE  ETFO  OCSOA  OECTA  OPC  OPSEU  OPSOA

OSSTF  OTHER (please specify)

Please indicate how you heard about RTO/ERO (please check all that apply):

<input type="checkbox"/> Attended an RTO/ERO Retirement Planning Workshop	Advertising in:	<input type="checkbox"/> <i>University Affairs</i> magazine
<input type="checkbox"/> From a retired colleague	<input type="checkbox"/> Affiliate/Association magazine	<input type="checkbox"/> Other (please specify)
<input type="checkbox"/> From my Affiliate/Association	<input type="checkbox"/> <i>Forum</i> magazine	<input type="text"/>
<input type="checkbox"/> From my School Board	<input type="checkbox"/> Online advertising	
<input type="checkbox"/> From the OTPP	<input type="checkbox"/> <i>Principal Connections</i> magazine	
<input type="checkbox"/> From the RTO/ERO magazine, <i>Renaissance</i>	<input type="checkbox"/> <i>Professionally Speaking</i> magazine	

**Check ONLY ONE of the following Districts or individual Units within a District, to which you wish to belong:**

- |   |  |   |  |
|---|--|---|--|
| 1. <input type="checkbox"/> <b>Rainy River</b><br><input type="checkbox"/> Atikokan                                 | 15. <input type="checkbox"/> <b>Halton</b>   | 24. <input type="checkbox"/> <b>Scarborough and East York</b> (see also 16, 22, 23) | 40. <input type="checkbox"/> <b>Brant</b>  |
| 2. <input type="checkbox"/> <b>Thunder Bay</b>  | 16. <input type="checkbox"/> <b>City of Toronto</b><br>(see also 22, 23, 24)   | 25. <input type="checkbox"/> <b>Stormont, Dundas, Glengarry</b>                     | 41. <input type="checkbox"/> <b>Elgin</b>  |
| 3. <input type="checkbox"/> <b>Algoma</b>   | 17. <b>Simcoe</b><br><input type="checkbox"/> Barrie, Central Simcoe<br><input type="checkbox"/> Orillia, North Simcoe<br><input type="checkbox"/> Alliston, South Simcoe<br><input type="checkbox"/> Collingwood, West Simcoe | 26. <input type="checkbox"/> <b>Kenora</b>  | 42. <b>Mainland British Columbia</b><br>(see also 47)<br><input type="checkbox"/> BC Mainland/Sunshine Coast<br><input type="checkbox"/> BC Interior |
| 4. <input type="checkbox"/> <b>Sudbury/Manitoulin</b><br><input type="checkbox"/> Manitoulin/North Shore            | 18. <input type="checkbox"/> <b>Haliburton,</b><br><input type="checkbox"/> <b>Kawartha Lakes</b>  | 27. <input type="checkbox"/> <b>Ottawa-Carleton</b>                                 | 43. <input type="checkbox"/> <b>Nipissing</b> (see also 44)  |
| 5. <input type="checkbox"/> <b>Cochrane, Temiskaming</b>  | 19. <input type="checkbox"/> <b>Hastings and Prince Edward</b>   | 28. <input type="checkbox"/> <b>Region of Durham</b>                                | 44. <input type="checkbox"/> <b>Région du ciel bleu</b><br>(Francophone District for #43 Nipissing)  |
| 6. <b>Parry Sound</b><br><input type="checkbox"/> Parry Sound East<br><input type="checkbox"/> Parry Sound West     | 20. <input type="checkbox"/> <b>Frontenac, Lennox &amp; Addington</b>  | 29. <input type="checkbox"/> <b>Lanark</b>  | 45. <input type="checkbox"/> <b>EstaRiO</b> (Francophone District for #32 Prescott-Russell)  |
| 7. <input type="checkbox"/> <b>Windsor-Essex</b>  | 21. <b>Renfrew</b><br><input type="checkbox"/> Renfrew – North<br><input type="checkbox"/> Renfrew – South   | 30. <input type="checkbox"/> <b>Northumberland</b>                                  | 46. <input type="checkbox"/> <b>Muskoka</b>  |
| 8. <input type="checkbox"/> <b>London, Middlesex</b>  | 22. <input type="checkbox"/> <b>Etobicoke and York</b><br>(see also 16, 23, 24)  | 31. <input type="checkbox"/> <b>Wellington</b>                                      | 47. <b>Vancouver Island</b><br>(see also 42)<br><input type="checkbox"/> Victoria<br><input type="checkbox"/> Mid/Upper Island                       |
| 9. <input type="checkbox"/> <b>Huron, Perth</b>   | 23. <input type="checkbox"/> <b>North York</b><br>(see also 16, 22, 24)  | 32. <input type="checkbox"/> <b>Prescott-Russell</b><br>(see also 45)               | 48. <input type="checkbox"/> <b>Leeds and Grenville</b>  |
| 10. <b>Grey and Bruce, Dufferin</b><br><input type="checkbox"/> Grey and Bruce<br><input type="checkbox"/> Dufferin |  | 33. <input type="checkbox"/> <b>Chatham-Kent</b>                                    | <input type="checkbox"/> <b>I do not wish to belong to a District.</b>   |
| 11. <input type="checkbox"/> <b>Waterloo</b>  |  | 34. <input type="checkbox"/> <b>York Region</b>                                     |  |
| 12. <input type="checkbox"/> <b>Norfolk</b>   |  | 35. <input type="checkbox"/> <b>Dryden</b><br><input type="checkbox"/> Red Lake     |  |
| 13. <input type="checkbox"/> <b>Hamilton-Wentworth, Haldimand</b>   |  | 36. <input type="checkbox"/> <b>Peterborough</b>                                    |  |
| 14. <input type="checkbox"/> <b>Niagara</b>   |  | 37. <input type="checkbox"/> <b>Oxford</b>  |  |
|   |  | 38. <input type="checkbox"/> <b>Lambton</b>   |  |
|   |  | 39. <input type="checkbox"/> <b>Peel</b>  |  |

- I hereby apply for membership in RTO/ERO.
- I consent to the collection, use and disclosure of any personal information required to administer my membership in RTO/ERO.
- I hereby certify that I have completed this application so that all statements made herein are true and correct in all respects and may be relied upon by RTO/ERO without further inquiry.
- Commencing in the second full year of my membership, I direct OTPP to deduct Full membership fees from my pension each January and remit the fees to RTO/ERO; this only applies to those applying to be a Full Member.

<p><b>DATE OF SIGNATURE</b></p> <p>DAY MONTH YEAR</p>	<p><b>SIGNATURE</b></p>
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Please complete pages 1-3 of this form >>>>>



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**DO NOT FILL IN FOR OFFICE USE ONLY**      /      /

**Completion of this page is required to process your application for RTO/ERO membership.**

## Payment Information

**Your first year’s membership fee is payable to RTO/ERO by credit card or cheque. We need to receive your initial payment based on your membership start date (see chart below for fee details), before we can process your application.**

**If you are applying as a Surviving Spouse or as an Actively Employed member, please contact RTO/ERO at 1-800-361-9888 or [membership@rto-ero.org](mailto:membership@rto-ero.org) as the fee chart DOES NOT apply to you.**

**You only need to pay the amount for the month in which you will join RTO/ERO. Fees in first year of membership (please check the appropriate box below):**

Membership start	2014 Fee	Membership start	2014 Fee	Membership start	2014 Fee
<input type="checkbox"/> JANUARY .....	\$53	<input type="checkbox"/> MAY .....	\$37	<input type="checkbox"/> SEPTEMBER .....	\$21
<input type="checkbox"/> FEBRUARY .....	\$49	<input type="checkbox"/> JUNE .....	\$33	<input type="checkbox"/> OCTOBER .....	\$17
<input type="checkbox"/> MARCH .....	\$45	<input type="checkbox"/> JULY .....	\$29	<input type="checkbox"/> NOVEMBER .....	\$13
<input type="checkbox"/> APRIL .....	\$41	<input type="checkbox"/> AUGUST .....	\$25	<input type="checkbox"/> DECEMBER .....	\$9

**NAME OF APPLICANT**

**METHOD OF PAYMENT**

**Credit card**

**VISA**     **MasterCard**     **American Express**

**NAME OF CARDHOLDER**

<b>CARD NUMBER</b>	<b>EXPIRY DATE</b> MONTH      YEAR	<b>SECURITY CODE</b>
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**SIGNATURE**

**DATE**

DAY	MONTH	YEAR
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**OR**

**Cheque enclosed**

Please refer to additional information on next page

**A self-addressed, stamped envelope is enclosed for this application. If you are applying for RTO/ERO Group Insurance Plans at the same time, please complete and include both forms in the same envelope. Please note your membership application will be processed first.**

## My fee in the second year of membership

### What is the difference between my membership fees in my first and my second year?

- Your initial membership fee is a **non-refundable** amount paid by a new member upon confirmation of RTO/ERO membership eligibility. The amount charged depends on the month in which your membership starts (**see application fee table on the previous page**).
- Your full membership fee is paid annually, starting from the first calendar year after you first join. Members who receive OTPP pension pay \$1.25 per \$1,000 of their gross OTPP pension. Members from all other membership categories pay a fixed fee.

### How much is my membership in RTO/ERO?

- **Full members** – Your membership fee for next year will be deducted directly from your Ontario Teachers' Pension in January. The 2014 rate is \$1.25 per \$1,000 of gross annual pension, e.g. if your pension is \$25,000 per annum, your annual RTO/ERO fee is  $\$1.25 \times 25 = \$31.25$ .
- **Full Commuted Value members** – You will be invoiced for your membership fee for next year. The fee is based on the average fee paid by Full Members in receipt of Ontario Teachers' Pension. In 2014 the fee is \$53.
- **Associate members – Surviving Spouse** – Your membership fee for next year will be deducted directly from your Ontario Teachers' Survivor Pension. The 2014 rate is \$1.25 per \$1,000 of gross annual pension, e.g. if your pension is \$25,000 per annum, your annual RTO/ERO fee is  $\$1.25 \times 25 = \$31.25$ .
- **Associate members – Actively Employed** – You will be invoiced for your membership fee for next year. The 2014 fee is \$32.
- **All other Associate members** – You will be invoiced for your membership fee for next year. The fee is based on the average fee paid by Full Members in receipt of Ontario Teachers' Pension. In 2014 the fee is \$53.

### How do I pay for my membership?

- If you are a Full member or a Surviving Spouse with a pension, your full-year membership fee will be deducted directly from your Ontario Teachers' Pension.
- All other Associate and Commuted Value members will be invoiced.

### When do I need to pay for my membership?

- Members who have an Ontario Teachers' Pension will be deducted each January by the OTPP. All other members will be invoiced.

### Do I have to be an RTO/ERO member if I want to participate in RTO/ERO group insurance plans?

- Yes. Your RTO/ERO membership must be in good standing to participate in RTO/ERO group insurance plans.



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18 Spadina Road, Suite 300, Toronto ON M5R 2S7

416-962-9463 1-800-361-9888 • fax 416-962-1061 • [www.rto-ero.org](http://www.rto-ero.org) • [info@rto-ero.org](mailto:info@rto-ero.org)

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