



With you for life.

**Retirement Award Application – Application Deadlines March 15<sup>th</sup>, 2012 and September 15<sup>th</sup>, 2012**

If you are planning to retire in the next six months, enter to win a **\$2000** Retirement Award. There will be two random draws held annually – one in March and one in September.

Name of Applicant: \_\_\_\_\_  
 (Surname) (First Name) (Initial)

Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_

OPPA CU Account #: \_\_\_\_\_

Detachment: \_\_\_\_\_

**What is your official/tentative retirement date?** \_\_\_\_\_

What are your plans when you retire?

- Travel
- Stay home and enjoy retirement
- Work part-time
- Work full-time
- Other \_\_\_\_\_

Have you thought about your investment options for your retirement allowance/severance payment?

- Yes, but I haven't made a decision.
- Yes, but I haven't received enough information to make a decision.
- Yes, but I am still unsure about when I will retire.
- Yes, I have made a decision.
- No. \_\_\_\_\_

Would you like your OPPA Credit Union Member Service Advisor to contact you to discuss your retirement allowance/severance package investment options?

- Yes
- No

If yes, how would you prefer to be contacted?

- Phone
- Email
- Other \_\_\_\_\_

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

# Are You Thinking About Retiring?

When you make the decision to retire, there are many things to consider.

- Should I use my retiring allowance to make a **major purchase**?
- Should I use my retiring allowance to **pay off current debt**?
- Should I **invest** my retiring allowance?
- What should I do with my **stat bank and holiday payout**?
- Do I plan to **work** after retiring from the OPP?

The OPPA Credit Union takes great pride in knowing about your pension plan and other retirement payments, such as your retiring allowance/severance payment, stat bank and holiday payouts. Let us provide you with advice on all of the questions listed above and help you plan for your retirement!

## Pensioner's Parking Account

Not sure what you want to do with your retiring allowance/ severance payment, stat bank and holiday payout?

Park your money in the Pensioner's Parking Account and enjoy the following benefits:

- **Guaranteed rate.** The Pensioner's Parking Account is a high interest savings account.
- **Take up to one year to decide what you would like to do.**
- **Access your funds whenever you need to.**
- **FREE PARKING - No fees!**
- **Eligible for RRSP, Spousal RSP and non-registered.**

If you need some help completing the paperwork in regards to your retiring allowance/severance payment, your Member Service Advisor will be happy to assist you and answer any questions.



With you for life.