

WORKSHOPS

FOR EMPLOYER AND UNION PENSION ADMINISTRATION STAFF



A brand new training year is starting! Come and join the Employer Education and Training Team as they continue to deliver their education program to employer staff.

Responding to your needs is our top priority. Feedback from previous workshops has indicated that more detailed pension training is a priority for employers. The training workshops will benefit staff who are new to pension administration and staff who are old hands at pension administration.

The Employer Education and Training Team sponsors workshops in various locations around the province. Each workshop will provide you with detailed information on pension administration from the employer's perspective. You will see how the tasks you perform fit into the lifecycle of the plan member and their journey through life as a member of a pension plan.



**PENSION
CORPORATION**

New Workshop Series for Employer Pension Administration Staff

“Thank you for this opportunity. Besides the material covered, it served to raise my awareness of pension issues vis a vis our employees. I will be much more proactive (hopefully) on this benefit.”

Our new approach to training allows you to tailor your participation to suit your organization. You can choose from four one-day workshops and one two-day workshop. Pick as many (or few) as you want.

Workshops

We'll provide you with relevant and effective training to administer the pension plan in the following workshops:

1. Enrolment (1 day)
2. Reports to the Corporation (1 day)
3. Purchase of Service (1 day)
4. Retirement I (basics) (1 day) **or**
5. Retirement II (comprehensive) (2 days)

The workshops focus on core information that applies to the four pension plans: College, Municipal, Public Service and Teachers'. We'll provide plan-specific information as needed. The workshops are interactive, so we will be encouraging your participation and will ask for your feedback.

The dates that we will be in your area are on the **Workshop Schedule**. The application form is on the back page of this brochure. Please use **one** application form for each person wishing to attend. You may photocopy the application or download copies from the forms area of your plan's employer page on the web at pensionsbc.ca.

To Register

If you are interested in attending, please fax your completed application form to: 250 953-0451

If you have any questions, please contact us at:

- Employer Education - 250 356-8350
- ERET.PensionCorp@pensionsbc.ca

The sessions will proceed with a minimum of 20 participants and a maximum of 25.

Please note: Workshops will be cancelled 10 days prior to the date if there is insufficient registration.

Workshops for Employer Pension Administration Staff

Workshop Descriptions

Enrolment – 1 day

This one-day workshop delves into the details of determining an employee's eligibility to become a member and enrol in the plan. Comprehensive exercises and information will aid you in the process of member enrolment as well as completing any forms that may be required at this stage.

Reports to the Corporation – 1 day

This is a day of exercises designed to assist you with reporting, deducting and remitting employer and member contributions, and salary and service data. You will receive new instructions on reporting for members who are receiving long-term disability benefits.

Purchase of Service – 1 day

This one-day workshop will cover purchase of service rules for each pension plan. We will demonstrate the use of the online Purchase Cost Estimator and show you how to complete the *Purchase of Service Application* form and the *Sources of Payment Worksheet*.

Please choose the retirement workshop that best suits your staff. It's not necessary to attend both.

Retirement I (basics) – 1 day

This new one-day workshop is an overview of the retirement process. This workshop is designed specifically for your staff who assist plan members by processing their forms at retirement. It includes instructions on completing the spousal declaration and tax forms, applications for pension, MSP and extended health and dental coverage. Use of the online pension estimator and purchase cost estimator will be demonstrated.

Retirement II (comprehensive) – 2 days

This new two-day workshop will provide you with a comprehensive and detailed guide to the steps leading to retirement. You will learn about the pension formula, any reductions that could be applied to a pension and how the choice of a pension option a member makes can impact their pension. We'll demonstrate how to use the corporation's online estimators to calculate pensions and increases to pension as a result of purchasing service. You will be able to provide your plan members with the information they need to make their pension decisions.

"I thought the course was excellent and very useful. I feel much more confident about being able to administer the plan more efficiently. The training manual will be a very useful tool."



APPLICATION FORM

Employer Workshops March - November 2003

- Name of attendee: _____
- Job Title: _____
- Number of years in pension administration: _____
- Email Address: _____
- Time: 8:30 a.m. to 4:00 p.m. Lunch and beverages will be provided.
- Cost: No registration fee (all materials are provided). Possible travel expenses are the participants' responsibility.

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- Please fill out the name and ID of the organization that you represent.
 - Please **fax** the completed application form to Employer Education (250) 953-0451 at least 30 days prior to the session.
 - Attendees will receive session confirmation by e-mail with location details.
 - Organization Name: _____ ID: _____
 - Are you attending as a union representative? Yes No

Session	Location	Date
1. Enrolment		
2. Reports to the Corporation		
3. Purchase of Service		
4. Retirement I (basics)		
5. Retirement II (comprehensive) – 2 days		