



# THE PENSION COMMISSION

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## FORM NO. 6

### APPLICATION FOR APPROVAL AS A TRUSTEE

(All questions must be completed - please type or print)

1 Provide the name of the trustee and the following information:

\_\_\_\_\_

*(Note: If the trustee is a company, use the name of the company)*

\_\_\_\_\_

*(primary contact)*

\_\_\_\_\_

*(mailing address)*

\_\_\_\_\_

*(postal code)*

\_\_\_\_\_

*(telephone number)*

\_\_\_\_\_

*(ext.)*

\_\_\_\_\_

*(email)*

2 Indicate whether the trustee is *(check the most appropriate)*:

a licensed trust company

an individual

another company (please advise type e.g. insurance, banking, etc.)

\_\_\_\_\_

other *(please advise details)* \_\_\_\_\_

3 If the trustee is an individual, indicate if a representative of:

the employer or employers or any other person required to make contributions

members or former members

a union

other *(please advise details)*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**INFORMATION CONCERNING THE PENSION PLAN**

4 What is the name of the pension plan?

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5 Indicate the type of plan (*check the most appropriate*) :

multi-employer

\_\_\_\_\_ defined benefit

\_\_\_\_\_ defined contribution

defined contribution

defined benefit

other (*provide details*) \_\_\_\_\_

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**OTHER PENSION PLANS**

6 Does the applicant act (or has the applicant acted previously) as a trustee for any other pension plans?

yes

no

*If "yes", provide the name of the previous plan(s) including the registration or reference number(s) (f applicable):*

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7 The following documents are required (as applicable) for each type of trustee and must be submitted with this Form.

completed personal questionnaire

completed corporate questionnaire

**APPLICATION FEE: \$100**

**enclosed**

Payment can be made by cheque payable to the Pension Commission or directly to the Commission's bank account. Please return this Form (with proof of payment) to the Pension Commission via [info@pensioncommission.bm](mailto:info@pensioncommission.bm)

**Please note that if the applicant is approved, an additional fee of \$100 fee is payable to the Commission to issue the certificate of approval.**

# THE PENSION COMMISSION

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## FORM NO. 6

### APPLICATION FOR APPROVAL AS A TRUSTEE

#### DECLARATION

I, \_\_\_\_\_ (please print),  
(Name of trustee)

hereby apply for approval as a trustee of the Pension Plan identified in this Form in accordance with the Act and the Regulations. I make the application in connection with

\_\_\_\_\_  
(Name of the pension plan)

Attached are certified copies of the documents that support this application and required to be submitted under the Act and the Regulations.

#### I DECLARE THAT:

1. The information provided in this Form and documents submitted with this application comply with the Act and the Regulations;
2. I understand that the obligation to ensure that the information submitted in this Form and documents required to be submitted that comply with the Act and the Regulations is my responsibility and I declare that I have fulfilled that obligation and have complied with the provisions of the Act and the Regulations in making this application for approval.
3. I am aware of my obligations under the Act and that the contents of this Form and the documents submitted with this Form, and my declarations are true to the best of my knowledge and belief.

DATED this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_

\_\_\_\_\_  
*Signature of Witness*

\_\_\_\_\_  
*Signature of applicant or authorized signing officer of applicant*

\_\_\_\_\_  
*Name of Witness (printed)*

\_\_\_\_\_  
*Name of applicant or authorized signing officer of applicant*