



Agreement to administer benefits under the Old Age Security Act and/or the Canada Pension Plan by an Agency or Institution

Trustees must maintain yearly records of the monies received and spent for our beneficiaries. Should the Minister want an accounting report, the trustee must provide the requested documentation for the applicable year(s).

It is very important that you:

- use a **pen** and **print** as clearly as possible.

Beneficiary's
Social Insurance Number

The information contained on this form is essential for payments of benefits under the *Old Age Security Act* and/or the *Canada Pension Plan* to persons acting on behalf of a beneficiary who is incapable of managing his/her own affairs. It is retained in the information bank relating to the benefit being paid. Under the *Privacy Act*, the beneficiary has the right to request a copy of this record.

Old Age Security and/or Canada Pension Plan beneficiary

Mr.	Mrs.	Usual First Name and Initial	Last Name
Ms.	Miss		

Agency or Institution

Official Name of Agency or Institution

Address - No., Street, Apt., P.O. Box, R.R. and City

Province or Territory

Country - If other than Canada

Postal Code

We hereby agree, where so appointed, to receive benefits payable to any beneficiary under the *Old Age Security Act* and/or the *Canada Pension Plan* that Employment and Social Development Canada may direct to be paid to this agency or institution, and undertake without charge:

1. to act on behalf of the beneficiary, and, in accordance with any directions from Employment and Social Development Canada, to administer and expend the benefits in the best interests of that beneficiary;
2. to complete an accounting report for all benefits received and the payments made from them, upon request from Employment and Social Development Canada;
3. to notify Employment and Social Development Canada if the beneficiary changes address, becomes absent from Canada, dies or ceases to be incapable of managing his/her own affairs, or if the trusteeship ends; and to provide any other information or evidence, and to do anything that the *Old Age Security Act* and/or the *Canada Pension Plan* or the Regulations would require from the beneficiary; and
4. to return, if the beneficiary should die, all his/her Old Age Security and/or Canada Pension Plan benefit payments which may be made after the month of death, and to reimburse His Majesty the King in Right of Canada for any loss sustained by him through the receipt of such payments.

If you are a municipality or a charitable or non-profit organization applying to administer the benefits of an incapable senior who is homeless or at imminent risk of being homeless, please complete questions 1 to 3.

Information about the individual's living situation

1. I hereby attest that I have assessed the individual's living situation and believe that the individual named above is homeless or at imminent risk of being homeless due to the following factors (check all that apply):

- ☐ the absence of a fixed home address
- ☐ a regular pattern of shelter usage
- ☐ a precarious/unsafe/inadequate housing arrangement
- ☐ self-identification of the individual as being homeless

Beneficiary's Social Insurance Number

Information about your Organization**2. Organization Type**

I hereby attest that our organization _____ is:
Organization Name

☐ **A Municipality** incorporated under the relevant Provincial or Territorial Act (Please provide the name and section of the relevant Act) _____

☐ **A Registered Charity** (Please provide your Charitable Registration Number) _____

☐ **A Non-Profit Organization** (Please indicate if your organization possesses an exemption under the *Income Tax Act*

☐ Yes *If yes, please provide proof of the exemption. If this is not available, please provide information supporting your status as a non-profit organization

☐ No

3. Please confirm that you have the relevant professional liability insurance or, in the case of municipalities, the ability to fund a liability.

☐ Yes

☐ No

NOTE: If you make a false or misleading statement, you may be subject to an administrative monetary penalty and interest, if any, under the *Canada Pension Plan* or the *Old Age Security Act*, or may be charged with an offence. Any benefits you received or obtained to which there was no entitlement would have to be repaid.

IN WITNESS WHEREOF, this document has been executed under seal on behalf of the agency or institution named above, by its officers duly authorized in that regard, this _____ day of _____ of the year _____.

Signature of Representative of Agency or Institution**Signed, Sealed and Delivered in the presence of**

Signature of Witness

Signature of Representative

Name of Witness - Please print

Name of representative - Please print

Address of Witness - No., Street, Apt., P.O. Box, R.R.

Please indicate your Title

City, Town or Village

Province or Territory

Country - if other than Canada

Postal Code

Telephone number

Telephone number

Occupation of Witness

Privacy Notice Statement

The information you provide is collected pursuant to the *Canada Pension Plan* (CPP) and its Regulations and under the authority of the *Old Age Security (OAS) Act* to administer benefits. The Social Insurance Number (SIN) is collected under the authority of section 52 of the *Canada Pension Plan Regulations* and section 18 of the *Old Age Security Regulations* and in accordance with the Treasury Board Secretariat Directive on the Social Insurance Number, which lists the CPP and OAS program as authorized users of the SIN. The SIN will be used to ensure an individual's exact identification and for income verification purposes with the Canada Revenue Agency (CRA).

Participation in the CPP and/or OAS program is voluntary. If you refuse to provide your personal information, the Department of Employment and Social Development Canada (ESDC) will be unable to process your application.

The information you provide may be shared within ESDC, with any federal institution, provincial authority or public body created under provincial law with which the Minister of ESDC may have entered into an agreement for the purpose of administering the CPP and/or OAS program, and/or with non-governmental third parties for the purpose of administering the CPP, OAS program, other acts of Parliament and federal or provincial law as well as for research, planning, evaluation and statistics purposes. However, these additional uses and/or disclosures of your personal information will never result in an administrative decision being made about you.

The information may also be shared with the government of other countries in accordance with agreements for the reciprocal administration or operation of the foreign pension program and the CPP and/or *Old Age Security Act*.

Your personal information is administered in accordance with the *Department of Employment and Social Development Act*, the CPP and/or *OAS Act*, the *Privacy Act* and other applicable laws. You have the right to the protection of, access to, and correction of your personal information, which is described in Personal Information Bank(s) ESDC PPU 116 and 146. Instructions for obtaining this information is outlined in the following government publication entitled *Info Source*.

Info Source may also be accessed on-line at any Service Canada Centre.

You have the right to file a complaint with the Privacy Commissioner of Canada regarding the institution's handling of your personal information at: priv.gc.ca/faqs/index_e.asp#q005.



Service
Canada

Service Canada Offices

Canada Pension Plan

Mail your forms to:

The nearest Service Canada office listed below.

From outside of Canada: The Service Canada office in the **province where you last resided**.

Need help completing the forms?

Canada or the United States: **1-800-277-9914**

All other countries: **1-613-957-1954** (we accept collect calls)

TTY: **1-800-255-4786**

Important: Please have your social insurance number ready when you call.

NEWFOUNDLAND AND LABRADOR

Service Canada
PO Box 9430 Station A
St. John's NL A1A 2Y5
CANADA

PRINCE EDWARD ISLAND

Service Canada
PO Box 8000 Station Central
Charlottetown PE C1A 8K1
CANADA

NOVA SCOTIA

Service Canada
PO Box 1687 Station Central
Halifax NS B3J 3J4
CANADA

NEW BRUNSWICK AND QUEBEC

Service Canada
PO Box 250
Fredericton NB E3B 4Z6
CANADA

ONTARIO

For postal codes beginning with "L, M or N"

Service Canada
PO Box 5100 Station D
Scarborough ON M1R 5C8
CANADA

ONTARIO

For postal codes beginning with "K or P"

Service Canada
PO Box 2013 Station Main
Timmins ON P4N 8C8
CANADA

MANITOBA AND SASKATCHEWAN

Service Canada
PO Box 818 Station Main
Winnipeg MB R3C 2N4
CANADA

ALBERTA / NORTHWEST TERRITORIES AND NUNAVUT

Service Canada
PO Box 2710 Station Main
Edmonton AB T5J 2G4
CANADA

BRITISH COLUMBIA AND YUKON

Service Canada
PO Box 1177 Station CSC
Victoria BC V8W 2V2
CANADA

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