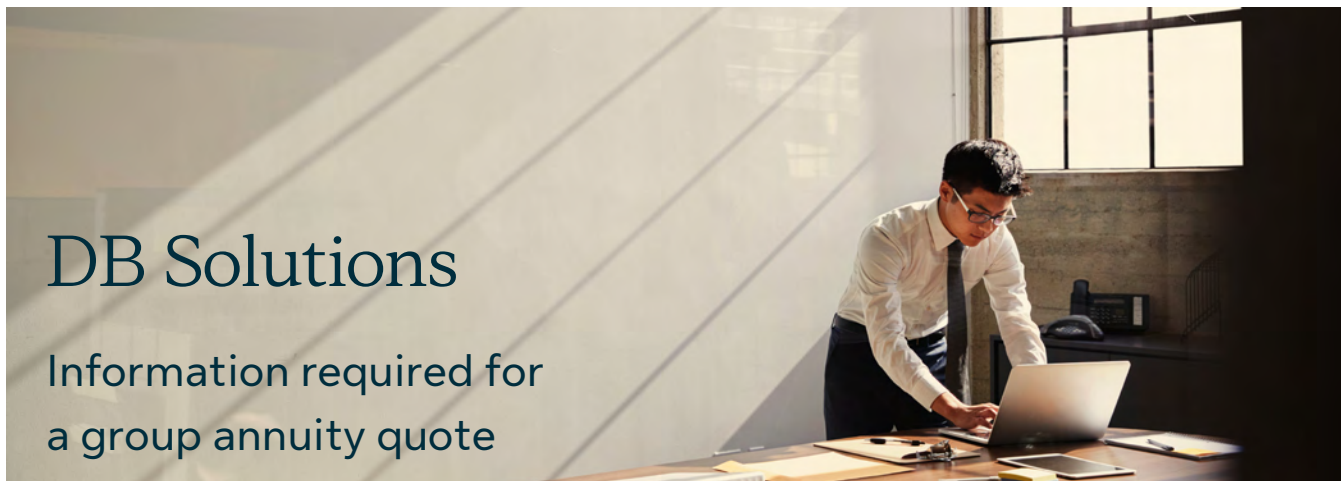


# DB Solutions

## Information required for a group annuity quote



### A

#### Plan specific information

- Full and exact name of pension plan
- Confirmation that it is a registered pension plan
- Province in which plan is registered
- Date of first pension payment
- Premium transfer date
- Whether portability upon retirement has ever been offered

### B

#### Annuitant specific information

##### 1. Personal information:

- Assigned sex at birth
- Date of birth
- Postal code
- Marital status (joint, single or survivor)

##### 2. Type of employment\*:

- Type of job held
- For each job type, a general description of the:
  - o Job
  - o Work environment
  - o Skill/education level required
  - o Average annual salary before retirement
- Hourly vs. salaried
- Factory vs. office
- Union vs. non-union

\* If this type of information is not available on a seriatim level, provide the proportion of liabilities in each job type, hourly vs. salaried etc.

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### 3. Monthly pension amount:

- Split by type (e.g. temporary bridge, lifetime pension, etc.)

### 4. Form of pension:

- Guaranteed and temporary ending dates
- Bridge benefits, form, beginning/end dates
- If joint option is selected:
  - Spouse's assigned sex at birth
  - Spouse's date of birth
  - Survivor continuation percentage
- Benefit indexation:
  - Indexation formula
  - Beginning/ending dates and frequency of increases
- Pop-up provisions or other special benefit provisions

### 5. If there are deferred members:

- Are the members commutable?
- Normal form of pension for single and joint members
- Spouse's assigned sex at birth and date of birth
- Optional forms of pension (actuarially equivalent or formulaic)
- Early retirement:
  - Earliest age allowed
  - Early retirement reduction (actuarially equivalent or formulaic)
- Provision for late retirement
- Pre-retirement and post-retirement benefit indexation
- "Pre" and "post" benefit split, if applicable
- Pre-retirement death benefit type

## C

### Additional information (if available)

- Pension plan mortality experience