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SECTION:	Administrator
INDEX NO.:	A300-502
TITLE:	Approved Pension Forms
APPROVED BY:	The Superintendent of Financial Services
PUBLISHED:	FSCO website (August 2008)
EFFECTIVE DATE:	August 1, 2008 [No longer applicable - replaced by A300-503 - June 2013]
REPLACES:	P300-300

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This policy replaces P300-300 (Computer-generated Forms) as of the effective date of this policy.

*Note: Where this policy conflicts with the Financial Services Commission of Ontario Act, 1997, S.O. 1997, c. 28 (FSCO Act), Pension Benefits Act, R.S.O. 1990, c. P.8 (PBA) or Regulation 909, R.R.O. 1990 (Regulation), the FSCO Act, PBA or Regulation govern.*

*Note: The electronic version of this policy, including direct access to all linked references, is available on FSCO's website at [www.fSCO.gov.on.ca](http://www.fSCO.gov.on.ca). All pension policies can be accessed from the **Pensions** section of the website through the **Pension Policies** link on the left side of each page.*

The PBA and Regulation authorize the Superintendent of Financial Services to approve a number of pension forms that must be used for various purposes in the administration of a pension plan. This policy sets out the options available to the administrator of the pension plan for obtaining and using the approved pension forms in the administration of the pension plan.

Copies of all [pension forms](#) except the Annual Information Return (AIR) and the PBGF assessment can be printed directly from the FSCO website. The administrator may choose to reproduce a form to allow electronic completion of the document. In this case, the form must be reproduced such that the contents and appearance of the form are virtually identical to the approved forms as they appear on the FSCO website.

The AIR and the PBGF assessment include plan specific information taken from FSCO's pension plan database. Each year, FSCO prepares and mails each pension plan's AIR and PBGF assessment forms directly to the administrator. These forms must be used to complete the required filings. Photocopies and modified forms from prior years are not accepted.

The webpage [Filing Information for Pension Plan Administrators](#) sets out information on the completion and filing of the AIR and PBGF assessment forms. If the forms have not been received or have been misplaced, this webpage provides an option to request duplicates of the AIR and PBGF assessment forms. These duplicate forms will be sent directly to the administrator. In the interim, specimen copies of the current AIR and PBGF assessment forms can be viewed through links from this webpage.