

***POLICY ON CUPE EMPLOYEE
PRE-RETIREMENT PLANNING SEMINARS***

Eligibility

Members of the CUPE Employees' Pension Plan (CEPP) are eligible to attend a pre-retirement planning seminar provided they have attained age 45 and have five years of credited service under the Plan. Eligible members may attend one seminar during their employment with CUPE. The employee's *spouse*, as defined under the CEPP Plan Text, may also participate. A *spouse* who is also a member of the CUPE Employees' Pension Plan may not attend twice, i.e. as a *spouse* and as a member.

Seminars

Each year, arrangements will be made to plan for up to four seminars. The locations will be dependent upon confirmed participation of at least 12 plan members and prior frequency. In a case when participation is less than 12 members, a seminar will be held at least every two years as determined by the Administrative Agent. The dates will be dependent upon speaker and hotel availability. Consideration shall also be given to arranging seminars around Division Conventions. Maximum participation will be limited to a total of thirty participants, i.e. members plus *spouses*. Only those eligible members working or residing within the region/province of the seminar location will be eligible to attend.

The seminars will be two days in duration and will be scheduled to take place on a Sunday and Monday. The seminar will end no later than 3:00 p.m. to allow for travel time home on the same day.

The topics covered will be:

- Psychological Adaptation to Retirement;
- Pension Benefits; and
- Financial Planning.

Time Off to Attend

CUPE employees participating in the seminars shall be granted leave with pay for any regularly scheduled work day during the seminar plus necessary travel time (time spent outside regularly scheduled work hours is not considered overtime). If additional time off is required by an employee choosing a means of transportation other than air travel to

commute to a seminar from an area of more than a normal day's travel, round trip, such time off may be requested as vacation leave. Lost wages of the *spouse* are not reimbursable.

Expenses

Expenses for employees and their *spouses* will be paid from the CUPE Employees' Pension Fund as follows:

Transportation

Required transportation costs, for both the employee and *spouse*, shall mean receipted air economy or train and related taxi fare. If an employee uses their car instead of air or train transportation, the employee will be reimbursed for kilometres in accordance with the provisions of the applicable collective agreement, and for receipted parking expenses. When a seminar is held within an employee's work or residence location, only receipted parking expenses will be eligible for a refund.

Prepaid airline tickets, as required, will be arranged for through WE Travel.

Hotel Accommodation

Required accommodation at the seminar hotel, for employees, who live outside the province/region of the seminar, will be arranged for by CUPE. Room and applicable taxes will be billed directly to CUPE. Employees will be responsible for payment of incidental expenses or other charges made to their room account.

Meals

A *per diem* allowance to cover meals will be paid to the employee only, in accordance with the applicable provisions of the employee's collective agreement.

Child Care

An employee shall be reimbursed for reasonable receipted childcare expenses that exceed their normal care costs. It is to be understood that "reasonable expenses" means whatever is reasonable in the area where the employee resides.

Other

Any other expenses will be subject to the approval of the Joint Board of Trustees on an individual basis, as necessary.