

POLICY ON CEPP PLAN MEMBER RETIREMENT COUNSELLING

Eligibility

Members of the CEPP are eligible to attend one counselling session with a JBT appointed counsellor. The plan member's spouse may also attend. It is recommended that the session be within three years of retirement. In the event of an active plan member's death prior to retirement, the surviving spouse will be offered an opportunity to meet with the JBT appointed counsellor at the time of the plan member's death if the active plan member did not have an opportunity to do so.

Counselling Session

Upon the request of an active plan member, or an eligible surviving spouse, arrangements will be made by the Administrative Agent for the JBT appointed counsellor to meet with the plan member, either in-person or by video conferencing, to discuss their pension benefits on retirement. The location for in-person meetings will be the plan member's city of work or residence or as otherwise determined by the counsellor. Plan members working or residing within a reasonable travel distance to Ottawa (e.g. Montreal, Cornwall, Kingston, etc.) may be required to travel to Ottawa by automobile or train for their counselling session. Where possible, meetings for other interested plan members requesting in-person counselling will be arranged to take place on or around the same date at the same location. Available dates for counselling sessions will be designated by the counsellor.

A session will last two to three hours, as required.

Time Off to Attend

CUPE employees attending a counselling session shall be granted leave with pay for time required to attend the session 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 session 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 plan members and their spouses will be paid from the CEPP Fund as follows:

Transportation

Should the counselling session be located outside of the plan member's area of work or residence, transportation costs, for both the plan member and spouse, shall include receipted air or train and related taxi fare. If a plan member uses their car instead of air or train transportation, the plan member will be reimbursed for kilometres in accordance with the provisions of the applicable collective agreement, to a maximum of what the economy airfare would be and for receipted parking expenses. When a counselling session is arranged in the plan member's area of work or residence, 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 hotel accommodation, for plan members and their spouses, will be arranged for by the Administrative Agent. Room and applicable taxes will be billed directly to CUPE. Plan members 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 plan member only, in accordance with the applicable provisions of the plan member's collective agreement.

Other

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