

THE ANGLICAN CHURCH OF CANADA

THE CONTINUING EDUCATION PLAN - APPLICATION FOR REIMBURSEMENT (NON-ACTIVE EMPLOYEES) *

PART I - TO THE ADMINISTRATOR, THE CONTINUING EDUCATION PLAN (PLEASE PRINT)

Employee's Name: _____ Diocese/Employer: _____

Address: _____

Tel: _____

Reimbursement requested for one or more of the following: (details and receipts are required for all expenses submitted for reimbursement. The receipt must indicate that payment was made in full.)

- Name of Program/Course _____
Sponsor: _____
Location: _____
Commencing: _____ and ending _____
- Books and Journals _____
- Computer Hardware/Software _____
- Equipment _____

Total Cost: \$ _____ Application Amount \$ _____ **(max. 75% of Total Cost)

How will this expenditure be of benefit to your employer?

EMPLOYEE SIGNATURE: _____ DATE: _____
(dd-mmm-yyyy)

I hereby confirm that the employee continues to perform work for the Participating Employer and that this expenditure confers a benefit upon such Employer.

SIGNATURE OF BISHOP/DIRECTOR: _____ DATE: _____
(dd-mmm-yyyy)

PART II - PENSION OFFICE USE ONLY

ACCOUNT HOLDER'S ACCUMULATION : \$ _____

AMOUNT OF CHEQUE : \$ _____

Date

Administrator/Continuing Education Plan

* No longer contributing to the plan due to retirement or account holders who are in receipt of a benefit from the Long Term Disability Plan.

Continuing education is a responsibility of all of us. It is the intention of the Plan that continuing education be self-directed, lifelong, systematic and sustained.

Administrative Policy

Canada Revenue Agency (CRA) requires that all funds used in the CEP by the account holders must be for the benefit of the employers. Our administrative policy is that account holders are not permitted to use the funds in their account within three months of the date of their retirement or termination, in order to satisfy CRA's requirement.

Application for Reimbursement

- employees can draw funds up to the amount available in their account
- bonus for use policy does not apply
- application form can be downloaded from <http://cep.anglican.ca>

Account balance information is available from the Administrator:

Tel: 416-960-2484 x 216 Toll free: 1-800-265-1070 email: con-ed@national.anglican.ca

All claims must be submitted within 12 months of the date of receipt for reimbursement.

Books and Journals

Books and journals may be purchased with account holder's accumulation. Books' titles and a copy of receipt of purchase must be attached to application form.

Computers

Hardware and software may be purchased with account holder's accumulation. A copy of receipt of purchase must be attached to application form.

Upon completion, return to:

**The Administrator
The Continuing Education Plan
The Pension Office Corporation
625 Church Street, Suite 401
Toronto, Ontario
M4Y 2G1**

****Note:** Please allow 15 business days to process your application for reimbursement.