

**APPLICATION FOR A BULLOCK-WEBSTER RETIREMENT GRANT**

Confidential Pensioner's Income Report

**PLEASE PRINT**

Please check one: Retired Clergy

Receiving Disability form General Synod Pension Plan

NAME IN FULL: \_\_\_\_\_

Surname

Christian Name

ADDRESS: \_\_\_\_\_

Apt. #, Street, City, Province, Postal Code

SOCIAL INSURANCE NO. \_\_\_\_\_

TELEPHONE NO. \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

Day/Month/Year

SPOUSE'S NAME: \_\_\_\_\_

SPOUSE'S DATE OF BIRTH: \_\_\_\_\_

Day/Month/Year

DEPENDENT CHILDREN

DATE OF BIRTH (Day/Month/Year)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ACCOMMODATION

DO YOU OWN

DO YOU RENT

MONTHLY INCOME (Gross before Deductions)

Recipient

Spouse

Salary or Wages

\_\_\_\_\_

\_\_\_\_\_

Investments

\_\_\_\_\_

\_\_\_\_\_

Old Age Security Pensions

\_\_\_\_\_

\_\_\_\_\_

Canada Pension Plan

\_\_\_\_\_

\_\_\_\_\_

General Synod Pension Plan

\_\_\_\_\_

\_\_\_\_\_

Other Pension (eg. Armed Forces)

\_\_\_\_\_

\_\_\_\_\_

Diocesan Pension Augmentation (if any)

\_\_\_\_\_

\_\_\_\_\_

Other (specify)

\_\_\_\_\_

\_\_\_\_\_

TOTAL

\_\_\_\_\_

\_\_\_\_\_

DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

RETURN TO: The Bishop of BC, 900 Vancouver Street, Victoria BC V8V 3V7

**NOTE: Any grant received is considered income by CRA. A T3 tax slip will be sent to you early in the new year.**

## **BULLOCK-WEBSTER TRUST GUIDELINES**

Grants will be made on the following basis:

1. To those retiring from the Ecclesiastical Province of British Columbia and Yukon and who have served five years in the Province immediately prior to retirement, or who have served five of the last ten years in the Province.
2. Where in the discretion of the Bishop there is sufficient need.
3. Those who retire at or after 65 years of age, or who have forty years of pensionable service, or who are accepted for permanent disability by General Synod Guidelines.
4. At the discretion of the Trustees, Bullock-Webster Retirement Grants are made on the basis of:
  - a. The Capital of the Bullock-Webster Trust is to be kept intact and only interest expended.
  - b. Priority is to be placed on Retirement Grants but Christmas bonuses to be given when funds are available.
  - c. Retirement Grants are determined by the Trustees at the Fall Meeting of the Provincial House of Bishops.
5. Benefits are available to all eligible clergy in the Ecclesiastical Province of British Columbia and Yukon.

\*\*\* Applications are ONLY reviewed at the fall session of the Provincial House of Bishops in September/October.

\*\*\* Applications MUST be received at least two weeks before the meeting so they can be forwarded to the bishops for their perusal.