

APPLICATION FOR A BULLOCK-WEBSTER RETIREMENT GRANT

Confidential Pensioner's Income Report

Deadline:
Nov.15, 2021

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: _____

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 deadline for the Provincial House of Bishops has been extended to November 15, 2021.

Return Address

By EMAIL: office@province-bcyukon.anglican.ca

By FAX: (778) 478- 8314

By MAIL: #201-380 Leathead Road. Kelowna, BC. V1X 2H8