

Apples & Oranges®

Benchmarking Study for Multi-Employer and Target Benefit Pension Plans



General Plan Information									
Pension Plan Name									
Industry									
Contact Information									
Name									
Title					Company				
Telephone					E-mail				
Asset Information									
Approximate value of fund assets: \$									
Bonds	%	Real Estate	%	Infrastructure Debt	%	Private Debt	% <small>PLEASE DESCRIBE</small>		
Equities	%	Hedge Funds	%	Infrastructure Equity	%	Other:	%		
Membership Count									
Total number of members			Number of active members			Average age of active members			
Other Plan Information									
Jurisdiction of registration									
AB	BC	MB	NB	NL	NS	ON	QC	SK	Federal
Does your Plan have an explicit margin (provision for adverse deviation, contingency reserve, etc.)? If yes, how much?									
No	Yes,	% of liabilities							
Has your Plan ever reduced accrued benefits? If yes, what percentage?									
No	Yes,	%							
Going-Concern Valuation Assumptions									
Discount rate			Mortality table			Mortality adjustment			

Benefit Information

Benefit formula

Flat Benefit

Career Average

Final Average

Formula

Ancillary benefits

Normal form other than life only:

Early retirement subsidies:

Other:

Contribution Information

Is your Plan a negotiated cost plan (are contributions negotiated)?

Yes

No

Average contribution rate (\$ per hour, % of earnings)

Employer:

Employee:

Average annual earnings:

Average hours worked per year:

Breakdown of annual required contributions

Normal cost:

Non-investment expenses:

Special payments:

Other (describe):