

# Service Canada Benefits Checklist

Are you receiving all the benefits that you are eligible for?  
Complete this checklist to find out!

*Disclaimer: This form may change from year-to-year*

## **Client information**

Full name: \_\_\_\_\_

Phone number: \_\_\_\_\_

Check all that apply:

I have filed my taxes within the past 3 years.

I have filed my taxes within the past 12 months.

I have a Canadian social insurance number.

I have a Canadian birth certificate.

I self-identify as an Indigenous person (First Nations, Métis or Inuit).

## **CPP Retirement pension**

The Canada Pension Plan (CPP) retirement pension is a monthly, taxable benefit that replaces part of your income when you retire. If you qualify, you will receive the CPP retirement pension for the rest of your life.

I am at least 60 years old.

I have made at least one valid contribution to the CPP.

If you answered yes to all of the above, you may qualify for the CPP Retirement Pension. Please complete Form ISP-1000 or call 1-800-277-9914.

This benefit can also be retroactive up to 12 months from the date of application so please apply as soon as possible.

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## **Canada Pension Plan disability benefits**

The Canada Pension Plan (CPP) disability benefit is a monthly payment. You may be eligible if:

I am under 65 years of age.

I have made enough contributions into the CPP.

I have a mental or physical disability that regularly stops you from doing any type of substantially gainful work.

I have a disability that is long-term and of indefinite duration, or is likely to result in death.

If you answered yes to some or all of the above, you may qualify for Canada Pension Plan disability benefits. Please complete Form ISP-1151 (non-terminal illness) or ISP-2530A (terminal illness) or call 1-800-277-9914.

## **Survivor's pension**

The Canada Pension Plan survivor's pension is a monthly payment paid to the legal spouse or common-law partner of the deceased contributor. You may be eligible if:

I am legally married to a deceased CPP contributor.

I am the common-law partner of a deceased CPP contributor.

If you answered yes to either of the above, you may qualify for Survivor's Pension. Please complete Form ISP-1300 or call 1-800-277-9914.

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## Old Age Security

The Old Age Security (OAS) pension is a monthly payment you may receive when you are 65 years and older. \*In most cases, you do not have to apply to get this benefit.\*

I am 65 years of age or older.

If you answered yes to the above, you may qualify for Old Age Security Pension. Please complete Form ISP-3550 or call 1-800-277-9914.

## Guaranteed Income Supplement

If you are receiving Old Age Security pension, you may also be eligible for the Guaranteed Income Supplement. You may qualify if:

I am 65 years of age or older.

I live in Canada.

I receive Old Age Security pension.

My income is below the [maximum annual income threshold for the GIS](#) based on my marital status.

If you answered yes to all of the above, you may qualify for the Guaranteed Income Supplement. Please complete Form ISP-3550 or call 1-800-277-9914.

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## Allowance

If you are eligible to receive the Guaranteed Income Supplement, your spouse or common-law partner may be able to receive the Allowance if your spouse or common-law partner:

I am 60 to 64 years of age.

I am a Canadian citizen or a legal resident.

I reside in Canada and have resided in Canada for at least 10 years since the age of 18.

My combined annual income is less than the [maximum annual income threshold for the Allowance](#).

If you answered yes to all of the above, you may qualify for the Allowance. Please complete Form ISP-3008 or call 1-800-277-9914.

## Allowance for the Survivor

The Allowance for the Survivor is a benefit available to people aged 60 to 64 who have a low income, who are living in Canada, and whose spouse or common-law partner has died. You qualify for the Allowance for the Survivor if you meet all of the following conditions:

I am 60 to 64 years of age.

My spouse or common-law partner has died and I have not remarried or entered into a common-law relationship.

My annual income is less than the [maximum annual income threshold for the Allowance for the Survivor](#).

If you answered yes to all of the above, you may qualify for the Allowance for the Survivor. Please complete Form ISP-3008 or call 1-800-277-9914.

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## Couple Living Apart for Reasons Beyond Their Control

The provision for couples living apart for reasons beyond their control allows Guaranteed Income Supplement (GIS) and Allowance (ALW) benefits to be calculated based on each individual's single income (rather than combined income) if this results in a higher benefit amount. This provision is applicable to couples where:

- a) One person is eligible for the GIS or;
- b) Both persons are eligible for the GIS or;
- c) One person is eligible for the GIS and the other one is eligible for the ALW.

Couples who share a room in a long-term care facility may be considered as living apart for reasons beyond their control; however, the provision does not apply to couples who share a dwelling that they maintain. A couple is considered to be living apart for reasons beyond their control when:

- o One person is in a nursing home or a chronic care hospital.
- o One person is hospitalized in a regular or active treatment hospital, or is waiting for a room in a nursing home or care facility.
- o One person is incarcerated.
- o The couple lives in separate single accommodations in the same nursing home.
- o The couple lives separately for medical reasons (e.g. proximity to medical assistance).

If any of the above examples describe recent changes to your living arrangements, you may be eligible to have your benefits recalculated based on a single income. Please complete Form ISP-3040 or call 1-800-277-9914 to have your file assessed.