

THE ANGLICAN CHURCH OF CANADA

THE CONTINUING EDUCATION PLAN APPLICATION FOR RETRAINING GRANT

The Continuing Education Plan provides a grant to account holders of CEP who are experiencing career crisis and who require retraining. Before such a grant is awarded, the account holder must use all accumulation in his/her account in the Continuing Education Plan up to the date of the proposed program.

Grants are subject to:

- \$2,000.00 limit
- The account holder must have 5 years' participation in the Plan
- Funds to be used for education or training
- Application must be made by the Bishop/Director on behalf of the employee

These grants are not available for retirement planning or resettlement.

COMPLETE THIS FORM TOGETHER WITH THE ATTACHED APPLICATION FOR ACCOUNT HOLDER'S ACCUMULATION

PART I – TO THE ADMINISTRATOR – THE CONTINUING EDUCATION PLAN

Employee's Name: _____ Diocese/Employer: _____

Nature of study: _____

Program: _____

Sponsor: _____

Location: _____

Commencing _____ and ending _____

Expenditure: \$ _____

_____ Total: \$ _____

I recommend the above-named employee in the above course of study and request that consideration be given for a retraining grant.

Bishop/Director

Date (dd-mmm-yyyy)

PART II – PENSION OFFICE USE ONLY

Account holder's accumulation: \$ _____

Retraining grant: \$ _____

Administrator/Continuing Education Plan

Date (dd-mmm-yyyy)

Application form can be downloaded from <http://cep.anglican.ca>

Upon completion, return to:

The Administrator
The Continuing Education Plan
The Pension Office Corporation
175 Bloor St East, South Tower,
Unit 1201, Toronto, ON, M4W 3R8.

THE ANGLICAN CHURCH OF CANADA

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

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

Employee Name: _____ Email: _____

Employee Address: _____

Employee Tel: _____ Employer/Diocese _____

Reimbursement requested for one or more of the following: (course registration details and proof of payment 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 _____

Items Purchased : _____

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

75% of Total Cost will be reimbursed from your account based on the availability of funds. In addition to this, a Bonus for Use will be reimbursed from the general assets. The Bonus for Use for this year is 10%.

You are not permitted to be reimbursed for expenses incurred within three months from the date of termination or retirement.

How will this expenditure be of benefit to your employer?

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

I hereby confirm that the above expenditure confers a benefit upon the employer.

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

PART II - TO THE EXECUTIVE DIRECTOR

The contributions for the current year amount to \$ _____ and cover the period _____
(dates)

I hereby authorize the Pension Office to transfer the contributions from the Diocesan/Employer Suspense Account to the Employee's credit.

Diocesan Treasurer/Director

PART III - PENSION OFFICE USE ONLY

ACCOUNT HOLDER'S ACCUMULATION : \$ _____

BONUS FOR USAGE : \$ _____

AMOUNT OF CHEQUE : \$ _____

Date

Administrator/Continuing Education 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

Parts II is processed through the Diocesan Synod/Employer Office

1. Employees can draw funds up to the amount available in their account
2. There is no limit to the amount employees can accumulate
3. Employees may be entitled to draw their accumulation to the end of the quarter in which the events take place
4. Application form can be downloaded from <http://cep.anglican.ca>
5. Please return the completed application with receipts to:
 - The Administrator
 - The Continuing Education Plan
 - The Pension Office Corporation
 - 175 Bloor St East, South Tower,
 - Unit 1201, Toronto, ON, M4W 3R8.

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

Account balance information is available from the Administrator:

Tel: 416-960-2484 x 209 Toll free: 1-800-265-1070

Sabbatical Grants

Grants may be provided to an employee for 8 weeks of continuous leave for study purposes after 5 years of employment. (For a D. Min. Program, the 8 weeks need not be consecutive). Applications are available from the Synod Office or the Administrator of the Continuing Education Plan or can be downloaded from <http://cep.anglican.ca>

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. Electronic devices with similar uses will only be reimbursed once every three years i.e. computers, laptops, tablets, iPads, smart phones etc.

Bonus for use

A bonus for use is provided based on the current earnings of the Plan.

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