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# OHIO CARPENTERS PENSION FUND BENEFIT DISTRIBUTION APPLICATION

## OH CARPENTERS' PENSION APPLICATION CHECKLIST

Please submit copies of the following documents with your application for benefits:

- Birth Certificate for you; Birth Certificate for your spouse or Death Certificate
- Marriage Certificate
- If divorced, you must submit a complete copy of your divorce decree(s)/separation agreement(s); Dissolution(s) of Marriage and any Fund approved Qualified Domestic Relations Order(s) with this application.

**\*\*Please do not send Originals of any requested documents. Originals will not be returned.**

**\*\*\*Your Application must be received by the last business day of the month prior to your retirement effective date.**

**\*\*\*\* YOU ARE NOT PERMITTED TO WORK ANY HOURS IN THE MONTH THAT YOU RETIRE. \*\*\*\***

### CHECKLIST OF ITEMS TO SUBMIT WITH YOUR BENEFIT APPLICATION:

PLEASE UTILIZE THE CHECKLIST BELOW TO ENSURE THAT YOU HAVE FULLY COMPLETED YOUR APPLICATION. THIS WILL EXPEDITE THE APPLICATION PROCESS. MISSING DOCUMENTS AND INCOMPLETE APPLICATION FORMS WILL DELAY THE PROCESSING OF YOUR APPLICATION. ITEMS THAT ARE IN **BOLD MUST** BE SIGNED IN FRONT OF A NOTARY PUBLIC (DATE OF BOTH SIGNATURES MUST MATCH)

- APPLICATION FORM –SIGNED AND DATED
- COPY OF YOUR BIRTH CERTIFICATE
- COPY OF YOUR SPOUSE'S BIRTH CERTIFICATE OR DEATH CERTIFICATE
- CERTIFICATION OF MARITAL/SINGLE STATUS**
- COPY OF MARRIAGE CERTIFICATE (PROVIDING ACTUAL DATE OF MARRIAGE ISSUED BY AN AUTHORIZED STATE AGENCY)
- COPY OF ALL PREVIOUS DIVORCE DECREES & SEPARATION AGREEMENTS
- COPY OF ALL QUALIFIED DOMESTIC RELATIONS ORDERS (QDRO'S)
- PENSION BENEFIT OPTION ELECTION FORM, INCLUDING THE SIGNED AND NOTARIZED **WAIVER OF 50% J & S OPTION, IF APPLICABLE (RETAIN ONE COPY FOR YOUR RECORDS)**
- WAIVER OF 30-DAY NOTICE REQUIREMENT, (IF APPLICABLE)**
- COMPLETED FEDERAL TAX WITHHOLDING FORM (IRS FORM W4P) AND STATE TAX WITHHOLDING FORM
- ELECTRONIC BANK DEPOSIT FORM
- SIGNED AND DATED COPY OF WORK RULES AFTER RETIREMENT **(RETAIN ONE COPY FOR YOUR RECORDS)**

**\*YOU ARE NOT PERMITTED TO WORK ANY HOURS IN THE MONTH THAT YOU RETIRE.**

PLEASE REVIEW THE FORMS YOU ARE SUBMITTING TO MAKE SURE THAT YOU HAVE COMPLETED ALL BLANK AREAS, SIGNED AND DATED WHERE NECESSARY, INCLUDING THE SIGNATURE OF A NOTARY WHERE APPLICABLE AND ANSWERED ALL QUESTIONS ACCURATELY AND COMPLETELY. **Note: YOU ARE NOT PERMITTED TO WORK ANY HOURS IN THE ACTUAL MONTH YOU ARE RETIRING.**