

APPLICATION FOR RETIREMENT BENEFITS

I hereby apply, under the Plan of the SHEET METAL WORKERS'LOCAL NO. 33 CLEVELAND DISTRICT PENSION FUND, for:

- ☐ Normal Retirement Benefit
- ☐ 55/30 Retirement
- ☐ Early Retirement Benefit (Age 55-64)
- ☐ Special Early Retirement (Age 62-64 w/3500 Hours in preceding 5 Years
- ☐ Social Security Level Income Benefit ((Age 55-64 only, must furnish report showing Social Security benefit entitlement)
- ☐ Deferred Vested Benefit

Desired Effective Date: _____ 1, _____.
(Month) (Year)

Please note, this application will be valid only if returned to the Fund Office within 90 days of your effective date. Your effective date will be no sooner than the first of the month after your application has been received in the Fund Office.

I hereby submit the following personal information about me and my spouse:
(Please type or print):

Participant Information:

Name _____

Social Security Number _____ Date of Birth _____

Address _____

Home Phone Number _____ Alternate Phone Number _____

The date you last worked or the date you last expect to work before retirement _____

Spouse Information:

Name _____

Social Security Number _____ Date of Birth _____

Date of Marriage: _____

PLEASE READ AND SIGN THE CERTIFICATION ON THE BACK OF THIS FORM

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CERTIFICATION

I hereby certify that all of the information furnished by me on this application form is, to the best of my belief and knowledge, true and complete. **I understand that this completed application form will be attached to and become part of my application for benefits and that when I submit such application, I must also submit acceptable proof of my age and, if I am married at that time, proof of my spouse's age and a copy of our marriage certificate. I understand that if I have ever been divorced and/or widowed, I must also provide the Fund Office with a complete copy of all of my Judgments of Divorce and/or Qualified Domestic Relations Orders (including Separation Agreements, Property Settlement Agreements and any similar or related orders with any attachments) and/or the death certificate(s) of my late spouse(s) or ex-spouse(s).**

I also agree that Pension payments are to be governed in all respects by the provisions of the Plan, or as same may hereafter be amended, and that the issuance of any Pension payment and its' acceptance by me shall not prevent the Fund from recovering, or otherwise affect its' right to recover, any payments issued to me in excess of the amount to which I am entitled under the provisions of the Plan, nor shall the issuance of any Pension payments to me obligate the Fund in any way to make any further payments in any amount whatsoever except as the same may be provided by the Plan as it may be amended from time to time.

Your Signature _____ **Date** _____

RETURN WITH:

- ☐ Certification of Marital/Single Status Form
- ☐ Withholding Certificate for Pension/Annuity Payments (IRS Form W-4P)
- ☐ Direct Deposit Agreement (Optional)
- ☐ Copy of your birth certificate
- ☐ Copy of your spouse's birth certificate, if applicable
- ☐ Copy of your marriage license
- ☐ Copy of any and all previous divorce decrees, Qualified Domestic Relations Orders, Separation Agreements, death certificates for previous spouse(s), etc

Please review the forms you are submitting to make sure that you have completed all blanks, signed where necessary, including the signature of a notary public where applicable, and answered the questions accurately and completely.