

SHEET METAL WORKERS' LOCAL NO. 33 PROFIT SHARING ANNUITY PLAN

Application for Hardship Distribution Checklist of Forms and Required Documentation

Please use the checklists below to make sure that you have completed your application. This will expedite the application process. Missing documents and an incomplete application form will delay the processing of your application. 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.

- ☐ Hardship Application
- ☐ Spousal Consent to Hardship Distribution
- ☐ Certification of Marital/Single Status
- ☐ Marriage **Certificate**
- ☐ Participant's Photo ID
- ☐ Spouse's Photo ID
- ☐ Participant Birth Certificate
- ☐ Spouse's Birth Certificate
- ☐ Letter of Explanation for Hardship

Previous Marriages:

- ☐ Judgment(s) of Divorce, including any Qualified Domestic Relations Order(s) and Property Settlement Agreement(s).
- ☐ Death Certificate(s) of former spouse(s)

Reason for Hardship and Required Documents:

FORECLOSURE/EVICTION: Foreclosure or Eviction from principal residence.

- ☐ Foreclosure Notice, or
- ☐ Notice of Foreclosure Sale, or
- ☐ Eviction Notice.

TUITION REIMBURSEMENT: Participant or dependent must be currently enrolled in college or trade school.

- ☐ Copy of the invoice, or
- ☐ Letter from the school confirming both the individual's enrollment and the amount of the expenses.
- ☐ Copy of dependent's birth certificate

MEDICAL EXPENSES: Expenses for participant or dependent, not covered by insurance.

- ☐ Copy of the invoice, or
- ☐ Letter from the health care provider describing the cost and need for the procedure, and
- ☐ Benefit statement or other evidence that insurance will not cover the expense. **EOB's are not acceptable**
- ☐ Copy of dependent's birth certificate

OTHER IMMEDIATE OR HEAVY FINANCIAL NEED: To be determined by the Board of Trustees, such as: utility bills, auto loan, auto repairs, and payment of credit card balances more than one month past due that cannot be repaid due to a reduction in the Participant's income over the previous year.

- ☐ Copies of current invoices or copies of current statements, or
- ☐ Estimate from a licensed repair facility detailing exact repairs needed, including both itemized and total costs.

DAMAGE REPAIR: Repair of Casualty Damage to Your Principal Residence.

- ☐ Evidence of damage.
- ☐ Proof of ownership.*
- ☐ Repair bill.
- ☐ Proof that insurance proceeds did not cover the expense.

*Sufficient proof of ownership of principal residence would be a copy of the title or deed to the property.

Evidence of financial obligations must be dated within the last 60 days, anything older than that will not be considered.

IMPORTANT! Several forms contained in this packet are **REQUIRED** to be signed in front of a Notary Public. The date of your signature **MUST** match the date of the Notary's signature. Notaries are often employed by banks, real estate agencies and governmental agencies (e.g. city hall). Failure to comply with this requirement will result in a delay in processing your application.