



# Bricklayers and Allied Craftsmen Local No. 11 of California Pension Trust Fund

## **This checklist is to help you to expedite your Pension Application Process**

1.  **Beneficiary Pension Application** - 1 page, complete the entire document. Be sure to sign and date it where required on bottom of page 1 and signature needs to be notarized. This form is required for processing of your application. (This is required for each beneficiary)

2.  **Beneficiary Birth Certificate** - If you are a **surviving child**, to process your application we require a copy of your Birth Certificate. This information is required for processing your application.

**Beneficiary Marriage Certificate** - If you are a **surviving Spouse**, to process your application we require a copy of your Marriage Certificate. This information is required for processing your application.

**Participant (Decedent) Birth Certificate** - If you are a **surviving Parent**, to process your application we require a copy of the Deceased Participant's Birth Certificate. This information is required for processing your application.

3.  **Attachment B - Election or Rejection of Direct Rollover to an IRA or Retirement Plan** - 2 pages, This form needs to be completed and signed. Even if you do not want to rollover your Pension, we need to have this form completed to process your application.

If you are choosing to have your distribution rolled over into a Qualified Account, this is the document you would use to give us your Qualified Retirement Account information. Indicate your choice on page one and supply your IRA or qualified Retirement Plan, Account Number, and Mailing address on page 2. Be sure to sign on both top and bottom signature lines on the form

If you do not want a rollover, initial the line next to the statement,        I do not want to roll over any of my payment to an IRA on page one and then sign and date on the bottom of page 2. This form is required for processing of your application.

4.  **Form W4P** - 1 page, This form needs to be completed and signed. If you are applying for a Lump Sum Distribution, please note that there will be Mandatory Federal Withholding of 20% of your distribution, so only put additional amount you want withheld on this form, otherwise please indicate -0-. If you are rolling over your distribution this still needs to be completed for the file. This form is required for processing of your application.

## **5. Death Certificate Copy**

This list is a summary of what is required to be returned for processing your application as a Qualified Beneficiary. Included with your application is Attachment A - Special Tax Notice Regarding Plan Payments.

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### **IMPORTANT NOTE NO APPLICATION WILL BE PROCESSED UNLESS ALL REQUIRED DOCUMENTS ACCOMPANY THE APPLICATION**

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