

PLUMBERS & PIPEFITTERS LOCAL 94 RETIREMENT PLAN

PH. (330) 779-8874

3660 STUTZ DR. STE 101, CANFIELD, OH 44406

Fx. (330) 270-0912

DISTRIBUTION APPLICATION

I hereby make application for benefits from the Plumbers & Pipefitters Local 94 Retirement Plan and certify that the information listed below is correct:

Participant Information:

Name _____

Social Security Number _____ Date of Birth _____

Address _____

Home Phone Number _____ Alternate Phone Number _____

Spouse Information:

Name _____

Social Security Number _____ Date of Birth _____

Type of Benefit:

_____ Retirement: Normal: Age 65 _____ Early: Age 55 _____

_____ Total and Permanent Disability: Submit evidence of Disability Social Security Award.

_____ Termination (must not have worked in the building trades for six (6) consecutive months and have had no contributions made to the plan)

Date last employed _____ for _____
(Employer)

Signature of Participant/Applicant _____ Date _____

Signature of Spouse, If Married _____ Date _____

Documents Required based on Marital Status:

If Single, enclose a copy of your birth certificate and photo ID.

If Married, enclose a copy of your birth certificate, a copy of your spouse's birth certificate, copy of your photo ID, copy of your spouse's photo ID, and a copy of your Marriage Certificate/License (must show the date of marriage).

If Divorced, documents listed above, plus enclose a complete copy of your Divorce Decree(s) with all attachments, for any and all previous marriages.

If Widowed, documents listed above, plus enclose a copy of the Death Certificate, for any and all previous spouses.



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LUMP SUM DISTRIBUTION ELECTION FORM

Distributions Options:

_____ **Lump Sum Payment** (☐ Cash or ☐ Rollover*)

_____ **Partial Distribution** (☐ Cash or ☐ Rollover*)

Amount of Distribution Requested \$ _____

_____ **Single Life Annuity**– Payable for the Life of the Participant.**

_____ **50% Joint & Survivor Annuity**– Payable for the Life of the Participant, with a 50% survivor annuity for the life of the Spouse.**

_____ **Installment Payments:**

_____ **Monthly payments of** \$ _____

_____ **Quarterly payments of** \$ _____

_____ **Annual payments of** \$ _____

Your Signature: _____

Date: _____

Spouse Signature: _____

Date: _____

* DIRECT ROLLOVER INSTRUCTIONS:

If you have elected a direct rollover of all or part of your benefit, please complete the section below:

Company Name of Custodian of your IRA: _____

Your IRA Account Number: _____

Address of the Custodian of IRA: _____

Printed Name of Custodian: _____

Phone Number of Custodian _____

**The Fund may provide benefits through the purchase from an insurance company of any appropriate annuity contract or contracts. Any fees, commissions or other costs directly incurred in connection with the purchase of any annuity may be deducted from the Individual Account balance immediately before purchase.



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CERTIFICATION OF MARITAL/SINGLE STATUS

Federal Law requires the Trustees to confirm whether a previous spouse is entitled to any portion of your pension benefits. As such, it is necessary that we request the following certification and supporting documentation. **Failure to complete this form fully, including signing it in front of a notary public or plan representative, and providing ALL documentation requested, will result in a delay of the processing of your application.**

Participant Name: _____ SSN: _____

- Current marital status:
- ☐ SINGLE, NEVER MARRIED
 - ☐ SINGLE, PREVIOUSLY MARRIED*
 - ☐ MARRIED, NO PREVIOUS MARRIAGES
 - ☐ MARRIED, WITH PREVIOUS MARRIAGE(S)*

*If you have had previous marriages, please list the names of your ex-spouses, the date(s) of marriage and date(s) of divorce (if any of your previous marriages ended due to the death of your spouse at the time, please list the date of death):

<u>Ex-spouse's Name</u>	<u>Date of Marriage</u>	<u>Date of Divorce/Death</u>
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_____	_____	_____
_____	_____	_____
_____	_____	_____

Please provide complete copies of ALL marriage certificates, divorce decrees, separation agreements, Qualified Domestic Relations Orders, and any other accompanying documents related to the termination of your previous marriage(s). If any previous spouses have passed away, please provide a copy of the death certificate(s). If you do not have these documents, you should contact the appropriate court through which the proceedings occurred in order to obtain certified copies.

I hereby certify, subject to the penalty of perjury, that the above information is, to the best of my belief and knowledge, true and complete. ANY PERSON WHO SUPPLIES A FALSE CERTIFICATION IN CLAIMING A BENEFIT FORFEITS ANY RIGHT HE OR SHE MAY HAVE TO THE BENEFIT AND, UPON DISCOVERY, BECOMES LIABLE FOR FULL REPAYMENT OF ANY MONEY RECEIVED AS A CONSEQUENCE.

Your Signature

Today's Date

Subscribed to and sworn to before me,

This _____ day of _____, 20____.

Notary Public, _____

County _____

State of _____

My Commission expires _____

DO NOT SIGN AND DATE THIS FORM UNLESS YOU ARE IN THE PRESENCE OF A NOTARY



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SPOUSAL CONSENT FORM

SPOUSAL CONSENT TO A PARTICIPANT'S ELECTION TO WAIVE PAYMENT IN THE FORM OF A 50% JOINT AND SURVIVOR ANNUITY

1. I acknowledge that I have read and understand the following:
 - (a) My spouse is a Participant in the Plumbers & Pipefitters Local 94 Retirement Plan.
 - (b) The Plan is an Annuity Plan, which provides for several forms of distribution options. The normal form of benefit for a married Participant is a 50% Joint & Survivor Annuity, which means that the Participant will receive a monthly amount for the Participant's life and, if the Participant dies before his or her Spouse, the Spouse will receive a monthly benefit for his or her lifetime that is 50% of the monthly amount the Participant received during the Participant's lifetime.
 - (c) I have the right to have the Plan pay my spouse's retirement benefit in the form of a 50% Joint & Survivor Annuity. I agree to give up that right. By signing this waiver, I acknowledge that I may receive less money than I would have received under the 50% Joint & Survivor Annuity.
 - (d) If my spouse elects the lump sum or single life annuity forms of benefit, which may happen if I consent to a waiver of the 50% Joint & Survivor Annuity, then I will receive nothing after my spouse dies.
 - (e) I do not have to consent to this election and do not have to sign this waiver. I am signing this waiver voluntarily and understand that if I do not sign this agreement, then my spouse and I will receive payments from the Plan in the form of a 50% Joint & Survivor Annuity.
 - (f) As of the effective date of my spouse's retirement, my consent is irrevocable.
2. I acknowledge that I have read and understand the information set out in this form. I hereby consent to my spouse's election to waive and/or reject the 50% Joint & Survivor Annuity Form of distribution

Signature of **SPOUSE** Date

I have witnessed the execution of the foregoing consent by _____, who identified herself/himself to me. (SPOUSE)

Subscribed to and sworn to before me,

This _____ day of _____, 20____.

Notary Public, _____

County _____

State of _____

My Commission expires _____

DO NOT SIGN AND DATE THIS FORM UNLESS YOU ARE IN THE PRESENCE OF A NOTARY.



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STATEMENT OF APPLICATION RECEIPT

(Married participants ONLY)

In order to comply with Federal Regulations related to the 30-day waiver form (enclosed with this application), the Fund Office must have a statement from you indicating the date you received an explanation of your benefit options.

Please indicate the date you received this application packet: _____

Your Signature: _____



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WAIVER OF 30-DAY WAITING PERIOD (MARRIED PARTICIPANTS ONLY)

*****BOTH SIGNATURES MUST BE WITNESSED BY A NOTARY PUBLIC*****

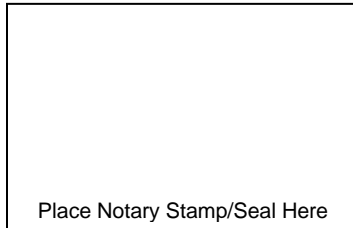
PARTICIPANT WAIVER

I, _____, hereby acknowledge that I have been informed that federal law prohibits the Fund from paying benefits to me until at least 30 days after my spouse and I have received a written explanation of the 50% Joint and Survivor form, including my right to waive that form with the written consent of my spouse, the effect of such a waiver and the right my spouse and I each have to revoke that waiver and consent. I have also been informed that I may waive that 30 day notice period and instead elect a 7 day notice period, which will permit the Fund to commence payment of benefits to me no less than 7 days after my spouse and I received the written explanation, provided my spouse also consents in writing to waiver of the 30 day notice period.

By signing below, I hereby elect to waive the 30-day notice period:

Participant Signature _____ Date _____

Sworn to and subscribed before me this _____ day of _____, 20_____



Place Notary Stamp/Seal Here

Notary Public Signature

County, State of _____

My Commission Expires _____

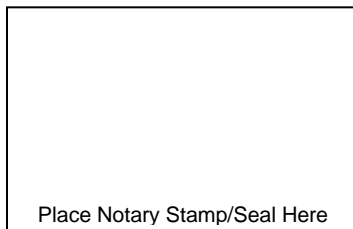
SPOUSAL CONSENT TO WAIVER OF 30 DAY NOTICE REQUIREMENT

I am the legal spouse of _____. I acknowledge that I have been informed that my spouse wishes to waive the requirement that we receive, at least 30 days before the Fund pays benefits to my spouse, a written explanation of the 50% Joint and Survivor form, including my spouse's right to waive the 50% Joint and Survivor form with my written consent, the effect of such a waiver and the right my spouse and I each have to revoke that waiver and consent, and to elect instead a 7 day notice period as permitted by federal law.

By signing below, I hereby consent to the election of my spouse to waive the 30 day notice period:

Spouse Signature _____ Date _____

Sworn to and subscribed before me this _____ day of _____, 20_____



Place Notary Stamp/Seal Here

Notary Public Signature

County, State of _____

My Commission Expires _____

**IF THIS FORM IS NOT SIGNED AND RETURNED, YOUR APPLICATION WILL BE HELD FOR 30 DAYS AFTER
RECEIPT OF YOUR APPLICATION.**

