

**Mid-Atlantic UFCW and Participating Employers
Pension Fund**

911 Ridgebrook Road
Sparks, Maryland 21152-9451
Telephone: (410) 683-6500
(800) 638-2972
www.associated-admin.com

8400 Corporate Drive, Suite 430
Landover, Maryland 20785-2361
Telephone: (301) 459-3020
(800) 638-2972
www.associated-admin.com

APPLICATION FOR PENSION

(Submission of this Application Does Not Guarantee You a Pension Benefit)

Please print and complete this form in full. Instructions are on reverse. Return completed form to:

Mid-Atlantic UFCW and Participating Employers Pension Fund, 911 Ridgebrook Road, Sparks, MD 21152-9451.

1. Name (Last, First, Middle) _____ 2. Social Security Number _____ 3. Home Telephone Number _____

4. Home Address (No., Apt. No., and Street) _____ City _____ State _____ 9-Digit Zip Code _____ County _____

PO Box No. _____

IF USING A PO BOX, BE SURE TO PROVIDE A STREET ADDRESS AS WELL. ALL INFORMATION WILL BE SENT TO PO BOX.

5. Birth Date (Mo./Day/Yr.) _____ 6. Marital Status (**Attach copy of Marriage Certificate, Divorce Decree or Legal Separation Agreement, or Death Certificate as applicable.**) 7. Actual Last Day Worked or to Be Worked (Mo./Day/Yr.) _____
Attach proof of age. (Examples of accepted forms of proof on back) Married Married, Previously Divorced Divorced
 Never Been Married Separated Widowed

6A. If you have ever been divorced, is there a Qualified Domestic Relations Order (QDRO) in place or pending? Yes No

8. Are you working now? List **all** present employers _____
 No _____ Full Time Part Time
 Yes _____ Full Time Part Time
_____ Full Time Part Time

9. Type of industry of present employer? _____
(Grocery, Retail, etc.)

10. Retirement Date (Mo./Day/Yr.) _____ 11. Are you currently collecting Workers' Compensation or Accident and Sickness pay? Yes No 12. Type of Pension (Circle One): Normal, Early, Disability, 30 & Out, Vested
If vested, from what employer did you earn a pension? _____

13. Spouse's Name (Last, First, Middle) _____ 14. Spouse's Birth Date (Mo./Day/Yr.) Attach proof of age. (See examples on back). _____

15. Spouse's Social Security Number: _____

DISABILITY SECTION

16. Are you applying for a Disability Pension? Yes No Date Disability Occurred: _____
Nature of Disability: _____

Have you received a Social Security Disability Award? Yes No

If yes, attach a copy of the favorable decision and the Disability Notice of Award Letter to this application. If no, you must receive a Disability Award before further action can be taken.

Have you started receiving Medicare? Yes No

If yes, attach a copy of your Medicare card.

Tax forms will be sent to you separately. You must complete the form(s) whether or not you wish to withhold taxes.

I hereby certify that the above information is true and correct to the best of my knowledge and belief. I understand that a false statement may disqualify me for pension benefits, and that the Trustees have the right to recover payments made to me as a result of false statements.

Signature _____ Date: _____

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Dear Participant:

Please provide this office with the following documents when you submit your Application for Pension. Note that submission of an application for pension does not guarantee you will receive a pension. Your application should be submitted to this office 60 to 90 days prior to your designated effective date of retirement.

**PLEASE DO NOT SEND ORIGINAL DOCUMENTS - SEND COPIES ONLY.
ORIGINAL DOCUMENTS WILL NOT BE RETURNED.**

DOCUMENTS REQUIRED WITH YOUR PENSION APPLICATION:

- **Never Been Married** – Your Birth Certificate
- **Married** – Your Birth Certificate, Your Spouse's Birth Certificate, Marriage Certificate
- **Married, Previously Divorced** – Your Birth Certificate, Your Spouse's Birth Certificate, Marriage Certificate, the *entire* Decree(s) of Absolute Divorce, signed by a judge
 - If the divorce decree states there is a Qualified Domestic Relations Order you must submit the *entire* document with the divorce decree.
 - If the divorce decree states there is any type of Property/Marital/Separation/Financial Agreement incorporated into the divorce decree, you must submit the entire agreement along with the entire divorce decree.
- **Divorced** – Your Birth Certificate, the *entire* Decree(s) of Absolute Divorce, signed by a judge
 - If the divorce decree states there is a Qualified Domestic Relations Order you must submit the *entire* document with the divorce decree.
 - If the divorce decree states there is any type of Property/Marital/Separation/Financial Agreement incorporated into the divorce decree, you must submit the entire agreement along with the entire divorce decree.
- **Legally Separated** – Your Birth Certificate, Marriage Certificate, entire Legal Separation Agreement
- **Separated (but not legally separated)** - Your Birth Certificate, Your Spouse's Birth Certificate, Your Marriage Certificate
- **Widowed** – Your Birth Certificate, Your Spouse's Death Certificate

We will not be able to process this pension application until all of the above information is received. Thank you in advance for your cooperation and understanding in this matter.

PENSION PROCESSING STEPS

1. Submit the completed pension application and all applicable documents listed above.
2. Please send *copies* of the original documents only. **ORIGINAL DOCUMENTS WILL NOT BE RETURNED.**
3. **THE ENTIRE PENSION APPLICATION MUST BE COMPLETED OR IT WILL BE RETURNED TO YOU FOR COMPLETION. THIS WILL CAUSE A DELAY IN PROCESSING YOUR APPLICATION.**
4. Upon receipt of the completed application, the Fund Office will send you forms to complete and return if you are eligible for retiree health and welfare benefits.
5. Approximately one month prior to your date of retirement, the Fund Office will send your final pension election form, tax forms and an electronic transfer form.

PLEASE NOTE: Before your pension can be processed, the Fund Office must receive all contributions from your employer. This will ensure that you receive all benefit service due. This may mean a delay in receiving your first pension check, but you will be paid retroactively to your date of retirement.

Sincerely,
Fund Office

INSTRUCTIONS FOR PREPARATION OF APPLICATION FOR PENSION

Most items are self-explanatory. Items which require further explanation are listed below.

Number 4: Zip Code – Please provide your 9 digit zip code. (If not known, call your local Post Office.)

Numbers 5 and 14: Proof of Age - You must attach proof of age. The proof of age must be furnished as high in order on the list as possible. Two forms of proof of age will be requested if the document you submit is below Item H on the list below.

- A. Birth Certificate
- B. Notification of Registration of Birth in a public registry of vital statistics
- C. Hospital Birth Record, certified by custodian
- D. Foreign church or government record
- E. Naturalization record
- F. Immigration papers
- G. Military record/Discharge form
- H. Passport
- I. Baptismal Certificate showing infant's date of birth on church record, certified by custodian
- J. School record which states date of birth, certified by custodian

****Take note: A Driver's License is not an acceptable form of Proof of Age.***

Number 6: You ***must*** select a Marital Status

Number 6A: ***If you have ever been divorced, you must answer Question 6A.*** *A Qualified Domestic Relations Order is a judicial order that recognizes that your former spouse may be legally entitled to an interest in your pension plan or retirement account.*

Number 7: The last day that you physically worked for a participating Employer. This does not include vacation days, personal holidays, etc.

Number 8: You must check Yes or No, Full Time or Part Time. If yes, enter the name of all your current employers.

Number 10: The first day of the month following the last day that you physically worked, as entered in Question 7. ***You must enter a date of retirement to process this application.*** Please contact this office if you need assistance.

Number 16: ***You MUST have been determined permanently and totally disabled and received a Disability Notice of Award letter from the Social Security Administration to apply for a Disability pension.*** The Notice of Award provides the date it was determined you became disabled according to the Social Security Administration's rules and the date your monthly disability benefits began.

Medicare – You ***must*** contact the Fund Office and provide a copy of your Medicare card as soon as you are determined eligible for any reason.

****You must sign and date the Pension Application. Pension Applications received without a signature will be returned for your signature and may cause a delay in processing.***