

**APPLICATION FOR BENEFITS DUE TO EMPLOYMENT TERMINATION**

Due to your employment termination, you are eligible to receive a distribution of your vested interest in the Plan. You may either apply for a taxable distribution, roll-over your benefits tax-free to either an IRA, or another qualified plan maintained by your new employer. To facilitate your request please complete this form.

**1 Employer Name:**

**Investment Company:**

**Plan #**

**2 Participant Name:**

**Social Security No.:**

**Street:**

**City:**

**State:**

**Zip:**

**Birth Date:**

**Hire Date:**

**Home Telephone:**

**Term Date:**

**3 Distribution Options:**

**Select to receive a Cash Distribution subject to taxes & penalties:**

**Select to roll over my assets taxfree to the following plan or IRA:**

Please indicate below on how you would like to receive your distribution. You may take a cash distribution, which is subject to 20% Federal tax withholding and a 10% penalty, or you may wish to roll over your money taxfree into an IRA or any new plan sponsored at your new employer.

**As provided in the plan documents, you will have to pay a minimal distribution fee of \$120.00**

**4 Rollover Information:**

**Company**

**Info**

**Plan Number**

**Address**

**City, Zip, State**

**5 Participant Signature:**

**Date:**

**6 Spouse's Signature:**

**Date:**

**Please mail or fax the completed form to:**

**Pacific Administrators - Attn: Bettina Waldraff**

**73140 Highway 111, Suite 6, Palm Desert CA 92260**

**tel: (760) 568-3626 - fax: (760) 568-3860 - e-mail: pensionadmin@pagroup.us**

**Administrators Use Only:**

**Date Form Mailed or Faxed:**

**Date Form Received:**

**Vesting Percentage:**

**Employer Matching:**

**Employer Discratory:**

**Outstanding Loan Balance:**

**Notes:**