

Notice of Separation of Service from Employment

Plan Name: _____

Employee Name: _____

Social Security #: **XXX-XX-** _____

Address: _____

City, State, Zip: _____

Home/Cell Phone: _____

Date of Hire: _____

Date of Birth: _____

Separation Date from Service _____

Check One: Termination Retirement Death Disability _____

Current Year Employment Information
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Date of Final Contributions Sent to Vendor: _____

Hours Worked (Plan Year to Date): _____

Plan Compensation Paid (Plan Year to Date): \$ _____

Is there a Plan Loan Outstanding? No if Yes, when will be the last payment deduction? _____

Is this distribution subject to a Qualified Domestic Relations Order (QDRO)?

No

A QDRO is a legal document that is filed with the court that recognizes the existence of an alternate payee (i.e. spouse, former spouse, and/or dependant) who has the right to receive benefits that are or will be payable to a participant of a retirement plan.

Yes (attach QDRO)

This Notice must be completed and forwarded to our office to initiate the distribution process. Pension Plan Consultants will send a distribution package to the participant within 7 days, outlining the distribution options. Once all distribution paperwork is received back from the participant and countersigned by the plan sponsor, the distribution will be processed within 7 days. Pension Plan Consultants LLC charges \$50.00 (Fifty Dollars) per distribution to the participant as identified in the Administration Services Agreement and is deducted from the participant account during the withdrawal process. All 1099R Tax reporting is processed by the TPA and/or financial custodian.

IMPORTANT

IF EMPLOYEE RETURNS TO SERVICE PLEASE NOTIFY OUR OFFICE IMMEDIATELY.

Trustee or Authorized Plan Administrator Signature

Date

Fax Form to Pension Plan Consultants (877) 626-7576

or Scan and email to info@PPC-TPA.com

Pension Plan Consultants, LLC - 1000 Germantown Pike - Suite H-1 - Plymouth Meeting, PA 19462