

ARIZONA LABORERS' AND TEAMSTERS' PENSION TRUST FUNDS

PENSION TRUST FUND
(DEFINED BENEFIT)

ADMINISTRATIVE OFFICE

ANNUITY TRUST FUND
(DEFINED CONTRIBUTION)

2400 W. DUNLAP AVE., SUITE 250
PHOENIX, AZ 85021
(602) 249-3582

APPLICATION FOR ANNUITY TRUST FUND

INSTRUCTIONS

1. PLEASE PRINT ALL INFORMATION
2. PLEASE ANSWER ALL QUESTIONS. THIS WILL PREVENT DELAYS IN PROCESSING YOUR APPLICATION.
3. SIGN AND DATE THIS APPLICATION.
4. MAIL COMPLETED APPLICATION AND PROOF OF AGE TO:

ARIZONA LABORERS' AND TEAMSTERS' ANNUITY FUND
SOUTHWEST SERVICE ADMINISTRATORS INC.
2400 WEST DUNLAP, # 250
PHOENIX, AZ 85021

PERSONAL DATA

NAME _____ TELEPHONE No. (____) _____

MAILING ADDRESS _____ CITY _____ STATE _____ ZIP CODE _____

SOCIAL SECURITY No. _____ / _____ / _____ BIRTH DATE _____ LOCAL UNION No. _____
ATTACH PROOF OF AGE, (E. G. BIRTH CERTIFICATE)

MARITAL STATUS – CHECK ALL THAT APPLY AND PROVIDE DATES WHERE APPLICABLE.

- SINGLE** (NEVER BEEN MARRIED)
- MARRIED** - NUMBER OF MARRIAGES _____
1. MARRIED DATE _____ NAME OF SPOUSE _____
 2. MARRIED DATE _____ NAME OF SPOUSE _____
 3. MARRIED DATE _____ NAME OF SPOUSE _____

PLEASE PROVIDE A COPY OF YOUR CURRENT MARRIAGE CERTIFICATE AND SPOUSE'S BIRTH CERTIFICATE.

- SEPARATED** – SPOUSE _____ DATE OF SEPARATION _____
- DIVORCED** - NUMBER OF DIVORCES _____
1. DIVORCE DATE _____ NAME OF EX-SPOUSE _____
 2. DIVORCE DATE _____ NAME OF EX-SPOUSE _____
 3. DIVORCE DATE _____ NAME OF EX-SPOUSE _____

PLEASE PROVIDE A COPY OF ALL APPLICABLE DIVORCE DECREES AND ANY QUALIFIED DOMESTIC RELATIONS ORDERS (QDROS).

- WIDOWED** – DECEASED SPOUSE _____ DOD _____

PLEASE PROVIDE A COPY OF YOUR SPOUSE'S DEATH CERTIFICATE.

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I HEREBY APPLY FOR BENEFITS FROM THE ANNUITY TRUST FUND DUE TO:

RETIREMENT FROM EMPLOYMENT

DATE YOU RETIRED OR INTEND TO RETIRE _____
(MUST BE 55 YEARS OF AGE OR OLDER TO RETIRE)

DATE YOU LAST WORKED OR INTEND TO WORK _____

MOST RECENT EMPLOYER _____

JOB TITLE _____

DISABILITY (ATTACH COPY OF SOCIAL SECURITY DISABILITY AWARD CERTIFICATE)

SIGNATURE _____ DATE _____

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ARIZONA LABORERS' AND TEAMSTERS' ANNUITY PLAN HOW YOUR BENEFIT IS AFFECTED BY RETIRING EARLY

The Pension Protection Act of 2006 (PPA) requires notice to applicants of the consequences of taking a benefit early instead of deferring that distribution to a later date.

Right to Defer. Under the Plan's rules, you may wait to commence your benefits until April 1 of the year following the year you reach age 70½. Of course, you may elect to start your benefit at any time before that date provided you meet the eligibility requirements as described on page 2 in your Summary Plan Description (SPD).

Consequences of Failing to Defer Your Distribution. If you postpone the distribution, the Board of Trustees will continue to invest the money in your account as described on page 2 of your SPD and your account will continue to be adjusted for any gains, losses or administrative expenses as described on page 1 of your SPD.

Amounts received at some future date will be subject to the tax withholding and taxation rules then applicable to the recipient.

If you have any questions about your pension benefit or the forms of payment, please contact the Fund Office.