



Retirement Documentation Return Checklist

The Church Pension Fund has developed this Retirement Documentation Return Checklist to assist you in making sure you return all the proper documentation to expeditiously process your retirement paperwork.

Application for Retirement

Complete all sections and have the application signed by both you and your Canonical Bishop. Please make sure an election for pension payment method and resettlement payout method (if applicable) is checked. Please complete the information sheet with as much information as possible. If you are a Bishop retiring, the Presiding Bishop's signature is required.

Pension Benefit Election Form

Complete the Spousal Benefit Option Election by electing a level of benefit for your spouse. *This form is double-sided so please make sure you read both sides.* Once you have selected your level of benefit both you and your spouse must sign and have the signatures notarized. If single and electing a Second Adult Beneficiary, complete the Pension Benefits for Named Beneficiary Form and have both signatures notarized.

Direct Deposit Authorization Form

Please complete the entire form if you wish to elect Direct Deposit for your pension payment. Be sure to include a voided check or a savings deposit slip with your form. Make sure the information is accurate and complete.

Withholding Certificates for Pension or Annuity Payments (W-4P)

Since you determine what portion of your benefit is taxable, we need you to complete **Form W-4P Withholding Certificate for Pension or Annuity Payments (Federal Income Tax)** and **Form W-4P State Equivalent (State Income Tax)**. Return both forms with your Income Tax elections; if you wish to have no withholding please mark the corresponding box for "No Withholding" and we will not withhold any income tax from your pension benefit. Please make sure you sign and date both forms.

Proof of Age Verification

Please provide proof of age for you and your named beneficiary. Copy of a baptismal certificate, passport, or driver's license is an acceptable proof of age. Please do not send originals; copies are sufficient.

Verification of Social Security Number

Please provide copies of you and your named beneficiary's social security card. Copy of your Medicare card, W-2 and/or legal tax documentation is an acceptable alternative proof of your social security number.

Outstanding Assessments

Please note that your pension payment may be withheld and total Credited Service and compensation reduced for assessments not paid in full. All outstanding assessments are due the 10th day of the month prior to your retirement effective date.