



ROMAN CATHOLIC ARCHDIOCESE OF BOSTON
BENEFIT TRUSTS

66 BROOKS DRIVE, BRAINTREE, MASSACHUSETTS 02184

September 20, 2021

Dear Pension Plan Participant:

Our records indicate that you are an active employee who will be age 55 or older with a vested benefit in the Roman Catholic Archdiocese of Boston Pension Plan (the “Plan”) as of December 31, 2021 *or* that you are a former employee with vested benefits, and that you have not previously been given the opportunity to elect commencement of your pension benefit.

You are now eligible to make a voluntary, one-time election to receive payment of your pension benefit on a reduced basis – as either a lump sum or an in-service/early annuity – beginning in **January 2022**. The window during which you may elect these options **opens September 24, 2021 and closes on December 1, 2021**. Please note that if your employment status changes before December 31, 2021, the options and benefits outlined in the enclosed may change. Please contact the Benefits Office if this occurs.

The following information regarding your options is included with this package:

- A personalized Participant Information and Election Form showing the benefit options and amounts available to you. Please note that a Spousal Consent Certification is required to be completed by married participants electing a lump sum;
- A Required Rollover and Tax Notice;
- Frequently Asked Questions (FAQs);
- Details regarding an upcoming information meeting and one-on-one confidential financial counseling sessions, along with items to bring if you plan to attend;
- A Checklist to remind you of the steps you need to take to make an election.

Please review the information in this package and return your completed, notarized packet to the Benefits Office **no later than December 1, 2021** in the enclosed postage-paid envelope. You may wish to make a copy of your Election Form and keep it with other important financial documents for your records.

In addition to the information meeting listed on the enclosed notice, you may obtain information about the Pension Plan by visiting www.catholicbenefits.org/pension/pension.htm. You may also contact the RCAB Benefits Office by phone at 617-746-5640 or by e-mail at benefits@rcab.org.

We encourage you to contact us through any of the channels noted above if you have questions regarding the contents of your package or about this election process.

Sincerely,

Carol Gustavson
Plan Administrator, Roman Catholic Archdiocese of Boston Pension Plan