



Roman Catholic Archdiocese of Boston Pension Plan Participant Benefit Election Checklist

Before mailing your Election Form to the Benefits Office, please make sure to:

- Review the entire election package.
 - Complete the *Personal Information* section of the Election Form, including your Social Security number, phone number and e-mail address.
 - Complete the appropriate section of the Election Form to indicate your election (*Lump Sum Distribution, Monthly Annuity* or *Election not to Participate*).
 - If you elect the voluntary Lump Sum Distribution payment and are married, you must complete and have notarized the *Spousal Consent Certification* portion of the Election Form. If electing the voluntary Lump Sum Distribution be sure you have elected **only one** of the three options.
 - Sign and date the *Participant Certification* section of the Election Form and have it notarized in the presence of a Notary Public.
 - Enclose a copy of your *Birth Certificate, Passport* or *Certificate of Baptism*, if you are electing a Lump Sum Distribution payment.
 - Make a copy of the Election Form for your records (optional).
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Please return your entire Election Form (4 pages) and other required
information **by June 1, 2017** to:

Benefits Office
Roman Catholic Archdiocese of Boston Benefits Trust
66 Brooks Drive
Braintree, MA 02184

A postage-paid envelope is included in your Election Package.