

UNITE HERE!
WORKERS AND HOSPITALITY EMPLOYERS VDB PENSION TRUST
RETIREMENT CHECKLIST

Election of Benefit Payment Form

- You have selected the Benefit Option
- Form is signed and dated

Waiver of 30 Day Form

- Form is signed and dated

Spousal Consent Form

- If you are married, the Spousal Consent Form must be completed unless you elected Joint & Survivor Annuity Payment
- If you are married, the Spousal Consent Form must be completed if you made any beneficiary designation other than your spouse
- Form is signed and dated by you and your spouse
- Signatures are witnessed by Notary Public

If you elect Life Annuity with 5 Years Guaranteed

- Completed Designated Beneficiary Election Form

Direct Deposit Form

- Form is signed and dated
- You have attached a “voided” check or savings deposit ticket so that your account and transit routing number can be confirmed

Federal and State Withholding Elections

- Federal Withholding Form is completed and signed
- State Withholding Form is completed and signed

Lump Sum / Rollover Elections (Only Complete if you are electing a Rollover or Lump Sum)

- Payment Election is made
- Rollover Information is provided if applicable
- Form is signed
- Certification section is signed