



California and Vicinity
Field Ironworkers Annuity Trust

VISTA # 092360

Termination Request

Account Information

Form fields for Social Security #, Local Union No., Name, Address, City, State, Zip, Date of birth, Date of hire, and Date of termination.

Withdrawal Classification

Reason for final distribution options: Service Pension, Retirement at or after age 62, Total Disability, Termination of employment.

Form of final distribution: (choose one) See reverse side of this form for additional information.

Direct rollover to:

Note: These options apply to either a partial or total direct rollover of cash.

Options for direct rollover: Vanguard IRA, Other Eligible Retirement Plan, Lump Sum Cash, Installments, Annuity.

Income Tax Withholding

This section does not apply to installments. See Installment Payment Request Form.

If you elect to have your entire eligible rollover distribution transferred in a direct rollover to an IRA or a qualified plan, no federal tax will be withheld. If you elect to have all or a portion of your eligible rollover distribution paid to you, the signer understands that a 20% federal tax will be withheld on the taxable portion of the distribution.

Withholding options: Withhold state taxes, Do not withhold state taxes.

Member's Signature, Spouse's Signature and Notarization

Note: Please be sure you have read the "Safe Harbor Explanation" provided by the Trust Office.

I certify under penalty of perjury that all of the foregoing information is true and correct. I understand that any false information may disqualify me for benefits and that the Board of Trustees shall have the right to recover any payment made to me because of fraudulent information submitted by me.

Signature and notarization lines for Applicant, Spouse, and Notary Public.

Authorization

Signature of Plan Administrator and Date

Distribution: White - Vanguard, Yellow - Trust Office, Pink - Member

T9317_122003



Instructions on Proof of Age:

Submit *one* of the following:

A certified copy of birth certificate or a certified copy of baptismal certificate or statement as to the date of birth show by a church record certified by the custodian of such record.

If you cannot submit a certified copy of either a birth certificate or baptismal certificate, submit photostatic copies of two (2) of the proofs listed below. You are cautioned, however, that Naturalization records, United States Passports, and Immigration records MAY NOT BE PHOTOSTATED. If you are submitting any of these, you must submit the original; it will be returned to you. Additional proofs of age may be requested if the documents you submit do not constitute convincing proof of your age.

1. Notification of registration in a public registry of vital statistics.
2. Certification of age by the United States Census Bureau.
3. Hospital birth records certified by the custodian of such record.
4. A foreign church or government record.
5. A signed statement certifying date of birth by the physician or midwife who was in attendance at birth.
6. Naturalization record (photostat not permitted; submit original).
7. Immigration record (photostat not permitted; submit original).
8. Military record.
9. Passport (United States Passport may not be photostated; submit original).
10. School record, certified by the custodian of such record.
11. Vaccination record, certified by the custodian of such record.
12. An insurance policy at least five years old.
13. Marriage record (application for marriage license or church record certified by the custodian of such record, or marriage certificate only if date of birth is listed).
14. Confirmation record (only if date of birth is listed).
15. Other evidence, such as voting record, poll tax receipts, driver's license, or signed statements from persons who have knowledge of the date of birth.

Form of Final Distribution

Withdrawal Classification

Vanguard IRA - By selecting this option you may choose to have all or a portion of your eligible balance rolled over to a Vanguard IRA. The Trust Office will supply you with a Direct Rollover Kit.

Other Eligible Retirement Plan; IRA or Qualified Plan - By selecting this option you may have all or a portion of your eligible cash balance rolled over to an IRA or qualified plan. The Trust Office will supply you with a Direct Rollover Form. In addition, it is your responsibility to open an account at the receiving institution prior to initiating your direct rollover through Vanguard.

Lump Sum Cash - By selecting this option you will receive your entire eligible cash balance.

Installments - By selecting this option you will receive 120 equal monthly distributions

Annuity - By selecting this option you will receive a series of payments over a period of time issued through an insurance carrier. (50% Contingent Annuity if married, or Life Annuity if unmarried.)