

Guide for Vested to Retiring Employees

You can help make the processing of your retirement as smooth and error-free as possible by completing each of the following steps:

- (1) You must provide a **birth certificate** or other documentation to verify the age of **yourself** and your **spouse**. You must also provide a copy of your marriage license and your spouse's social security number. See reverse side for a complete list of acceptable documentation. **This information must be provided prior to receiving your first retirement check.**
- (2) **All retirees are required to establish a direct deposit for their monthly pension payments.** A direct deposit form is enclosed.
- (3) You must decide if you want to have taxes deducted from your retirement benefit. A W4-P form is enclosed for that purpose.

The following documentation should be returned to us in the enclosed pre-addressed envelope:

City's Retirement Benefit:

- Your Benefit Calculation with the second page completed with your spouse's social security number (if applicable), the option under which you want to receive your benefit. Both your signature and your spouse's signature (if applicable) must to be notarized.
- The City of Tallahassee Beneficiary Designation form completed and signed (if you choose a Joint & Contingent option, your spouse must be your sole primary beneficiary).
- Check Disbursement Options form completed and signed.
- The City of Tallahassee Direct Deposit Authorization form completed and signed.
- The Election of Recipients of Periodic Payments from City of Tallahassee Defined Benefit Plan completed and signed.
- The Withholding Certificate for Pension or Annuity Payments – W4-P (Pension), completed and signed.
- A copy of your birth certificate, your spouse's birth certificate (if applicable) and your marriage license (if applicable).

MAP 401(k) Benefit or withdrawal (if applicable):

- The Termination/Distribution Election Form completed and signed. If you plan to receive a monthly benefit, please check the box for City Matched Payment.
- The Distribution Election Form completed and signed (if you plan to receive a monthly benefit). Make sure you complete the section under City Matched Payment.
- The Prudential Request for Direct Deposit form completed and signed (if you want your MAP monthly benefit direct deposited).
- The Withholding Certificate for Pension or Annuity Payments – W4-P (MAP), completed and signed.

RSVP Benefit or withdrawal (if applicable):

- The Termination/Distribution Election Form completed and signed.
- The Prudential Request for Direct Deposit form, completed and signed (if you plan to receive a monthly systematic withdrawal and want your payment direct deposited).
- The Withholding Certificate for Pension or Annuity Payments – W4-P (RSVP), completed and signed (only if you plan to receive a systematic withdrawal for 10 or more years).

If you have any questions or need additional information, please contact Retirement Administration at 891-8343.

BIRTH VERIFICATION

Listed below, in order of preference, are the documents we will accept as evidence of age:

- * Birth Certificate or Delayed Birth Certificate
- * Census Report (more than 30 years old)
- * Life Insurance policy (more than 30 years old)
- * Letter from the Social Security Administration Office, stating the date of birth it has established for you
- * Hospital birth record
- * Passport
- * Naturalization record (citizenship paper)

In the absence of the above, a document from two (2) of the following categories will be required:

- * Birth Certificate of child, showing age of parent
- * Family Bible or Baptismal Certificate
- * School Record at time of entering grammar school
- * Military Record
- * Official record of marriage issued at least 10 years ago, which shows your birth date or age