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Pension Application I

The information on this form will be used to prepare your pension calculation or evaluation. It must be accurate and complete in every detail. Please date and sign the form, and promptly return it to the Plan office at the address listed above.

If you are applying for a Pension Plan death benefit, please complete only Part G on the back of this form.

Part A - Census Data

Name, Social Security number, Address, Date of birth, Today's date, E-mail address, Telephone number, Employer, Date employed as an RN, Marital status, Single, Married, Widowed, Date of marriage, Divorced, Date of divorce, Name of spouse, Spouse's Social Security number, Spouse's date of birth

Part B - Pension Calculation

Please calculate my pension or indicate my vesting status based on the following information. For the pension benefit indicated below (please check one):

Normal retirement starting on, Disability benefit starting on, Early retirement starting on, Vested status only effective, Other (please specify) starting on, My last day of employment will be

Part C - Other Employers

Have you been employed by another employer participating in the Plan? No Yes (please complete below)
Employer name Dates (M/D/Y) Annual base compensation Full or part-time Regular weekly hours

Blank lines for entering employer information

Part D - Breaks in Service

Please indicate any breaks in employment since you started working at your current employer.

Date (from/to), Reason for break

Part E - Application Statement

I hereby apply for a pension (or vested status evaluation) as indicated in Part B and determined in accordance with the terms of the New York State Nurses Association Pension Plan. I certify that the statements I have made are true to the best of my knowledge. Further, I understand that if I return to work in covered employment at a participating employer of the New York State Nurses Association Pension Plan after my pension payments begin, such payments will be suspended during my period of re-employment.

Signature, Date

Please complete other side if you're applying for a disability pension or death benefit

Part F – Disability Pension

I became totally disabled on _____ I last worked on _____

The Social Security Administration found that I became disabled under their rules on _____

The first month of my entitlement to Social Security benefits is (was) _____

Please send the Plan office a copy of any notification you receive from the Social Security Administration regarding your disability.

Signature _____ **Date** _____

Part G – Death Benefit (beneficiary's statement)

Deceased participant's name _____ Social Security number _____

Your name _____ Your Social Security number _____

Address _____ Telephone _____

_____ Date of birth _____

Death benefit effective _____

Signature _____ **Date** _____

Please submit the following documents with this application:

- Original death certificate or a notarized copy of the death certificate.
- Notarized copy of your birth certificate (if you do not have a copy of your birth certificate, please submit two other notarized forms of identification, such as your driver's license, passport, or baptismal certificate).
- Certified or notarized copies of letters testamentary (if applicable).