

475 Riverside Drive Room 1020 New York, NY 10115-0059

> p800.642.6543 f 212.729.2701

www.pbucc.org info@pbucc.org

Pension Data Sheet

| Member ID | Name | e (last, first, middle initial) | □ Clergy □ Lay | | |
|--|-------------|---|----------------|--|--|
| Address (number and street) | | | | | |
| Telephone number (with area code) | | E-mail address | | | |
| Date of birth S | pouse's/San | ne Gender Domestic Partner's Social Security Number | | | |
| Participant of UCC Health Plan? (Yes or No) | | | | | |
| Self Spouse Same-Gender Domestic Partner | | | | | |
| Dear Annuitant or Beneficiary: | | | | | |
| Ideally, pension and Social Security payments, together with savings and investments, will provide for one's needs when earned income ceases. In reality, these sources are sometimes inadequate. The Pension Boards has several programs that may provide varying amounts of assistance, depending on eligibility requirements. This Pension Data Sheet is designed to help us determine if you are eligible for ministerial assistance. The information is treated with the strictest confidence. If you would prefer to not provide the information requested, <i>thereby renouncing any pension supplementation or health plan subsidy for which you may have qualified</i> , please sign and date the form on the space provided below. Please note that you may revoke your decision at any time. | | | | | |
| \Box I do not wish to provide this information at this time. | | | | | |
| Signature: Date: | | | | | |
| If the personal information above or following is incomplete or incorrect, please make the necessary changes or additions. If you do not have a Social Security Number, please state the reason in the space(s) provided below. | | | | | |
| Member: | | | | | |
| Spouse or Same-Gender Domestic Partner: | | | | | |

Pension Data 08/2013

| SOURCES OF INCOME | AMO | AMOUNT | | | | |
|---|--------------|--|----------------|--|--|--|
| | | Member | Spouse/Partner | | | |
| UCC Annuity Plan Pension | | | \$ | | | |
| Other UCC Pension (<i>example</i> : Board for World Ministries on church) | ·local \$ | | \$ | | | |
| Social Security | | | | | | |
| Pension Attributable to Other Work | \$ | | \$ | | | |
| Military Service Pension | \$ | | \$ | | | |
| Pension or Annuity from an Insurance Contract, IRA, etc. | \$ | | \$ | | | |
| Any Pension Income Other Than Monthly? • Source: | \$ | | \$ | | | |
| Frequency: Current Before-Tax Earnings of Spouse/Partner Under Age | e 65 \$ | | \$ | | | |
| Other Income (i.e., Reverse Mortgages), as specified belo | w: \$ | | \$ | | | |
| TOTAL INCOME | \$ | | \$ | | | |
| ASSETS | I | Yes | No | | | |
| If you own a personal residence: Do you have assets of more than \$75,000, other than your residence? | | | | | | |
| If you do not own a personal residence: Do you have assets of more than \$100,000? | | | | | | |
| Note: Persons living in nursing homes or other facilities that require that this gift be included as income are not eligible for supplementation. | | | | | | |
| SPOUSE'S/PARTNER' | | | | | | |
| (If applicable, please check the appropriate information below.) | | | | | | |
| Since my retirement: my spouse/partner has died my spouse/partner and I have divorced I have remarried | | | | | | |
| If your legal name has changed as a result of divorce or remarriage, please indicate your new name: | | Spouse's/Partner's date of birth (if applicable) | | | | |
| SIGNATURE | | | | | | |
| Signature D | ate | | | | | |