

Sunrise General Employees Retirement Fund

Separation from Employment Checklist

The below indicates the forms that employees must obtain and complete when they are separating employment, entering the DROP or retiring. The completed forms should be submitted directly to the Administrator of the Fund.

LEAVING EMPLOYMENT

Forms For All Terminated Employees Seeking a Refund of Contributions*

_____ Tax Withholding Notification and Election (*Form For All Terminated Employees, both Non-Vested and Vested, Seeking a Refund of Contributions*)

_____ Return Of Contributions Request And Waiver Of Rights (*Additional Form for Vested Terminated Employees Seeking a Refund (Employees With Over Five (5) Years Service)*)

_____ Special Tax Notice (*Notice to be given to All Terminated Employees*)

* The Administrator will normally receive final payroll from the City 2 to 4 weeks after your separation date. Once the Administrator receives the final payroll information from the City, it generally takes another 3 weeks for you to receive your refund of contributions. The check for the refund of contributions is sent via certified mail, return receipt requested.

RETIREMENT

Forms to Retire

_____ Retirement Checklist – What to Expect Upon Retirement

_____ Application for Pension or Retirement (*Retirement or Disability*)

_____ Copy of Birth Certificate or Driver's License for Participant **

_____ Copy of Birth Certificate or Driver's License for Joint Survivor**

_____ Physician Report Form for Non-Service Disability (*Non-Service Incurred Disability Only*)

_____ Physician Report Form for Service Connected Disability (*Service Connected Disability Only*)

_____ Beneficiary Designation (*Update If Necessary*)

_____ Benefit Election Form (*Pension Option Selected After Processing of Benefit Calculation*)

**If you are missing documentation when you DROP or retire, please submit your application prior to any deadlines. You should then provide the missing documentation in a timely manner.

Additional Forms To Begin Payment Of Retirement Benefits and DROP Distribution

_____ Direct Deposit Form (*Direct Deposit Of Pension Benefit To Checking Or Savings Account*)

_____ W-4P (*Tax Withholding Form For Pension Benefit*)

_____ Beneficiary Designation (*Update If Necessary*)

_____ Health Insurance Deduction Authorization (*Completed at City*)

_____ DROP Account Distribution Form (*DROP Only*)

_____ Administrative Rule Governing Distribution of DROP (*DROP Only*)

_____ Special Tax Notice (*DROP Only*)

Who should I call when I have questions? You may contact the administrator by any of the following methods:

- Phone: (561) 624-3277 ❖ (800) 206-0116 ❖ Fax: (561) 624-3278
- Mail:

Pension Resource Center, LLC
Attn: Sunrise General Employees Retirement Fund
4360 Northlake Boulevard, Suite 206
Palm Beach Gardens, FL 33410

- Web Site: www.ResourceCenters.com
- Email: sunrisegeneral@resource-team.com