

# SAG-PRODUCERS PENSION PLAN

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## Partial Lump Sum Pension Distribution Form

### Election or rejection of direct rollover to an IRA or retirement plan

- I choose to receive my partial lump sum benefit after withholding 20% for federal taxes as required by law.
- I want to roll over my partial lump sum payment directly to an IRA or other qualified retirement plan that accepts rollovers. The IRA or other qualified plan is named below. Further, I understand that payment of my benefits to the Trustee of the IRA or qualified retirement plan releases the Trustees of the SAG-Producers Pension Plan from any obligations or responsibilities with respect to the benefits so paid.
- I would like to have only part of my payment rolled over. Please roll over \$\_\_\_\_\_ to the IRA or qualified retirement plan named below, and pay the remainder of my benefit to me after withholding 20% for federal income tax as required by law.

**Note:** If you elected a direct rollover, you must provide all of the following information. The SAG-Producers Pension Plan will not make payment until you provide the information.

Please pay my benefit to:

\_\_\_\_\_  
Name of trustee of IRA or qualified retirement plan

\_\_\_\_\_  
Account number

If the benefit is to be rolled over to an IRA, the check must specifically name the trustee. For example, the payee line of the check should read: ABC Bank, Trustee fbo John Smith IRA Rollover A/C 0000000000.

Mailing address of qualified retirement plan:

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Participant signature

\_\_\_\_\_  
Date

/ /