

## **Payee Information Form**

PBGC Form 701

Approved OMB 1212-0055 Expires 04/30/06

Pension Benefit Guaranty Corporation. P.O. Box 151750 • Alexandria, VA 22315-1750

For assistance, call 1-800-400-7242

## **PRIVACY ACT NOTICE**

The Privacy Act of 1974, as amended, 5 U.S.C. § 552a (1994), requires PBGC to give you this notice when collecting information from you. PBGC uses the information to determine whether and how much of a pension benefit is due you under a private defined benefit pension plan that has terminated, and to make appropriate benefit payments. Your Social Security Number is used by PBGC to identify your records within PBGC, to report income for tax purposes, and to respond to lawful requests for information about you from other individuals and entities. Your response is voluntary. However, failure to provide information to PBGC, including your Social Security Number, may delay or prevent PBGC from calculating and paying your pension benefits.

PBGC may release information about you to other individuals and entities when necessary and appropriate under the Privacy Act, including: to third parties to make benefit payments to you; to a company that was responsible for your pension plan or to entities related to that company; to a labor organization that represents you; to obtain information from the Federal Aviation Administration relevant to a pilot or former pilot's eligibility for a disability benefit; to obtain your address from other sources when PBGC does not have a current or valid address for you; and to a limited extent to your spouse, former spouse, child, or other dependent when such individual may be entitled to benefits from PBGC.

PBGC may also release information about you to appropriate law enforcement agencies when PBGC becomes aware of a possible violation of civil or criminal law. If PBGC, an employee of PBGC, the United States, or another agency of the United States, is involved in litigation, PBGC may provide relevant information about you to a court or other adjudicative body or to the Department of Justice when it represents PBGC. PBGC may also provide information about you to the Office of Management and Budget in connection with review of private relief legislation or to a Congressional office in response to an inquiry that office makes about you at your request.

PBGC publishes notices in the Federal Register that describe in more detail when information about you may be made available to others. A copy of the most recent Federal Register notice may be obtained from PBGC's Contact Center by calling 1-800-400-7242. For TTY/TDD users, call the federal relay service toll free at 1-800-877-8339 and ask to be connected to 1-800-400-7242. PBGC's authority to collect information from you, including your Social Security Number, is derived from 29 U.S.C. §§ 1055, 1056(d)(3), 1302, 1321, 1322, 1322a, 1341 and 1350 (1994).

## PAPERWORK REDUCTION ACT NOTICE

The PBGC needs this information so that it can determine your entitlement, if any, to a pension benefit under a private defined benefit pension plan that has terminated. A defined benefit plan is a traditional pension plan that promises a specified monthly benefit at retirement. The PBGC does not pay benefits under 401(k) or other defined contribution plans, ongoing defined benefit plans, government plans, and certain other plans. Your response is voluntary. However, the information is required in order for you to receive such a pension benefit. The PBGC will use this information to determine the form and amount of any such pension benefit and to make appropriate payments. Under the Paperwork Reduction Act, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number. This collection of information has been approved by the Office of Management and Budget (OMB) under control number 1212-0055 (expires 04/30/2006). The information provided to the PBGC may be disclosable under the Freedom of Information Act and the Privacy Act. The PBGC estimates that the average burden of responding to a request for identifying information as part of an initial contact with the PBGC under the PBGC's Pension Search program is about 16 minutes, and that the average burden of complying with the information collection request in the PBGC's application package is about 34 minutes. Comments concerning the accuracy of this estimate or suggesti ons for further reducing this burden may be sent to Pension Benefit Guaranty Corporation, Office of the General Counsel, 1200 K Street, NW, Washington, DC 20005-4026.



Date Printed:

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Plan Name:
Plan Number:

Participant Name / SSN:

Date of Plan Termination:

**INSTRUCTIONS:** Please complete this form so PBGC can continue to send your pension benefit payments. Use dark ink and be sure to print clearly. If you have questions, contact our Customer Contact Center at 1-800-400-7242 for information.

1.	Ge	General information about you																														
Last Name																		First Name														
	Middle Name									Other Name(s) Used																						
	Social Security Number						Date of Birth										Gender					MA										
					-			-							1			1										FE	MALE			
	Ma	ailir	ng .	Add	dres	ss													Ар	artn	nen	t / Ro	Route Number									
	Ci	ty																	Sta	ate			Zip Code									
	Country													Email (OPTIONAL)																		
	Daytime Phone						EXTENSION Evening Phone									hone																
	(					)				-					x					(			)					-				

CONTINUE

Payee Information Form Plan Number:		Participant Name / SSN:													1, լ	, page 2 of 3						
Your relationship to person who participated in the plan:															MARK	ONL	Y ONE					
A. Self – The benefits are from my	pensio	n p	lan																	]		
B. Beneficiary - The benefits are	from th	ере	ensi	on p	olan	of	som	eo	ne v	vho	is	dec	eas	ed.								
My relationship to the participant: ☐ Spouse ☐ Other:																						
Name of Participant:																						
Date of participant's death:																						
C. Alternate payee - I have a Qualified Domestic Relations Order (QDRO) that establishes my right to receive some or all of a participant's benefits from a pension plan.																						
Name of Participant:																						
Date of QDRO:			1			1																
D. Other. Please explain:																						
<ol><li>Participant Information – Com</li></ol>	plete tl	nis	sec	tion	on	ly i	f yo	u c	hec	kec	3" t	Sel	f" in	se	ctio	on	1.					
If you are currently employed ple	ase prov	vide	info	rmat	tion	belo	w:															
Employer Name:						City	and	Sta	te													
Were you married when you retir	red? If	SO.	plea	se n	rovi	ide t	he ir	nfor	mati	on h	elo	w a	bou	VOL	ır			No			=	
Were you married when you retired? If so, please provide the information below about your spouse at retirement.  Spouse's Last Name  Spouse's First Name													. ,	••			Yes	3				
Spouse's Middle Name Other Name(s) Used																						
Spouse's Social Security Number	Sp	Spouse's Date of E						Birth Dat							iag							
										1												
Is there a Qualified Domestic Relat	Is there a Qualified Domestic Relations Order (QDRO) from a court that requires we pay sor											om	e	No								
						0111	$a \omega$	Jui	LLIIC	אנו ע	, qu											

CONTINUE

Date of the QDRO:

Name of alternate payee:

3.	Signature – You must sign and date this document. Knowingly and willfully making false, fict fraudulent statements to the Pension Benefit Guaranty Corporation is a crime punishable under Section 1001, and United States Code.																								
	I declare under penalty of perjury that	: all of th	ne in	formati	on I	hav	e provi	ded	on	this	s foi	rm i	s tr	ue	and	d co	orre	ect.							
	SIGNATURE								DATE																
4.	<b>Designation of Beneficiary</b> – PBGC may owe you payments at the time of your death. Generally, this will happen if your estimated benefit is too low. If your benefit will continue to be paid to another person after you death (as with a joint-and-survivor or certain-and-continuous annuity), the person receiving those continuing benefits will also receive any payments due to you at the time of your death. If there are no continuing benefits, PBGC will make any payments due to you at the time of your death to the person you designate below. If you do not designate anyone, or if the beneficiary you name dies before you, PBGC will pay the amount we owe you in this order: your spouse, your children, your parents, your estate, and your next of kin.															our iing iing ate the									
<b>Beneficiary</b> – I name the following person as my beneficiary for amounts owed to me at my dereplaces any previous designation and will only be effective when PBGC receives it.															deat	h.	Th	is							
	Last Name	Firs	irst Name																						
	Middle Name	Other	Nan	ne(s) Us	ed																				
	Social Security Number	Date o	of Bir	th					Gender MALE □																
			1		1				•					F	EMA	ιLE									
	Mailing Address Apartment / Route N														te Number										
	City					Sta	ate	Zip Code																	
	Country					Em	nail (optio	ONAL)																	
	Daytime Phone	NSIOI	٧	Evenin	ng Phone																				
	( )		X				(			)					-										
	Relationship to me, if any (e.g., spouse or	grandda	augh	ter, frier	nd)																				

Participant Name / SSN:

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**Payee Information Form** 

Plan Number:

TO CHANGE THIS DESIGNATION, CONTACT PBGC'S CUSTOMER CONTACT CENTER AT 1-800-400-7242.

THANK YOU.