

# MO-KAN IRON WORKERS TRUST FUNDS

PO Box 909500  
Kansas City, MO 64190-9500  
(816) 756-3313 OR Toll Free (866) 756-3313

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## Notice Regarding Application for Distribution Mo-Kan Iron Workers Annuity Fund

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Dear Participant:

Following please find an application for distribution of your Individual Account under the Mo-Kan Iron Workers Annuity Plan and instruction on how to prove your age. You must provide proof of your age to the Fund Office when you file your application.

Make sure you answer all questions, and sign and date the application. To be eligible, you must be retired or retiring on or after age 55, or you must have left Covered Employment for at least eighteen (18) months. Your Individual Account will not be paid if you return to Covered Employment before you (or your "Rollover Institution") receive the lump sum payment, if selected. If you wish to apply for benefits based on a Disability, please contact the Fund Office for the appropriate forms.

When completed, please return the application to the Fund Office. You must provide a copy of your **birth certificate**. You must also submit a copy of your **marriage certificate** *and* a copy of your **spouse's birth certificate** if you are married. If you are divorced or have been divorced please provide an original certified copy of your **divorce decree** including the **property settlement agreement**. A photo static copy of your divorce documents is not acceptable.

If you qualify for a distribution of your Individual Account, the Fund Office will provide you with additional information regarding benefit payment options and amounts. You will need to complete that information prior to receiving a distribution from the Plan.

If you have any questions, please feel free to contact our office.

Sincerely,

Wilson-McShane Corporation  
Fund Administrators

**MO-KAN IRON WORKERS ANNUITY PLAN**  
**PO Box 909500**  
**Kansas City, MO 64190-9500**  
**(816) 756-3313 OR Toll Free (866) 756-3313**

**APPLICATION FOR DISTRIBUTION OF INDIVIDUAL ACCOUNT**

You can help speed up the processing of this application by:

1. Answering each question completely;
2. Printing or typing your answers to the questions in ink;
3. Attaching additional information, if necessary, to the application.

**Please complete fully – Print or type answers. Sign, date, and return this form to the Fund Office.**

1. Name: \_\_\_\_\_
2. Address: \_\_\_\_\_  
 \_\_\_\_\_ Phone \_\_\_\_\_

3. Social Security Number: \_\_\_\_\_

4. Date of Birth: \_\_\_\_\_ (Submit copy of birth cert)

5. Are you married?     Yes                       No

Your spouse's name: \_\_\_\_\_

Your spouse's social security number: \_\_\_\_\_

Your spouse's date of birth: \_\_\_\_\_ (Submit copy of birth certificate)

Your date of marriage: \_\_\_\_\_ (Submit a copy of marriage cert)

6. Were you ever divorced?     No                       Yes

***(Submit original divorce decree and the settlement agreement)***

Date(s) of Divorce: \_\_\_\_\_

If yes is a QDRO involved?    \_\_\_\_ Yes                      \_\_\_\_ No

**Reason for distribution:**

Proposed Retirement Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Left Covered Employment Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Disability Date \_\_\_\_/\_\_\_\_/\_\_\_\_ (Submit proof of Total and Permanent Disability)

I hereby apply for distribution of my Individual Account from the Mo-Kan Iron Workers Annuity Plan and certify all statements in this application are true to the best of my knowledge and belief.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

# INSTRUCTIONS TO PENSION APPLICANTS

## PROOF OF AGE

**In order to be eligible for retirement benefits, you must furnish proof of your age. You must also provide proof of your spouse's age.**

The following list shows the type of documents, which may serve as proof of your age. Some of the documents are better proof than others. This list is arranged starting with the best type of proof and continues down to the less desirable types of documents. **You are required to furnish the best type of proof that is available, ideally a Birth Certificate.** It is recognized that, in certain instances, a birth certificate may not be available, particularly for those who were born outside of the United States. In such cases, you should secure the best type of proof. Photostat copies of the document may be submitted. Additional proof may be requested, if the document submitted is not convincing proof.

**You may supply any one (1) of the following documents as proof of age**

1. A Birth Certificate
2. Current (unexpired) Passport
3. Naturalization records
4. Military record
5. Marriage records showing date of birth (application for marriage license or church record, certified by custodian of such record; or marriage certificate)
6. Immigration papers
7. A baptismal certificate or a statement as to the date of birth shown by a church record, certified by the custodian of such record