



Submit completed form to:
County Employees' Retirement Fund
 2121 Schotthill Woods Drive
 Jefferson City, MO 65101
 Toll Free: 877-632-2373
 Fax: 573-761-4404

Version 5.3

FORM 3B
DEATH BENEFIT – SPOUSE (\$10,000)
PAYMENT ELECTION

The beneficiary spouse completes and signs this form indicating the election for payment of the \$10,000 death benefit distribution.

PARTICIPANT INFORMATION

Social Security Number	-	-					
First Name		Initial		Last Name		Suffix	

I have read this notice in its entirety and wish to have my distributions paid in the following manner:

<input type="checkbox"/>	Option A – Distribution paid directly to you with the mandatory 20% withholding. I want to have a direct payment to me with mandatory 20% federal income tax withheld from my distribution.
<input type="checkbox"/>	I want additional federal income tax withheld in the amount of \$_____. I will submit Form W-4P with this form. In order to have additional federal income tax withheld, you must complete and sign IRS Form W-4P and return it with this completed form. A copy of Form W-4P is available by contacting the County Employees' Retirement Fund or downloading it from its website, www.mocerf.org.
<input type="checkbox"/>	Option B – Direct rollover, thereby avoiding any federal income tax withheld from your distribution. I want to have a direct rollover, thereby avoiding mandatory 20% withholding.
<input type="checkbox"/>	The rollover should be directed to the following eligible retirement plan. I certify that to the best of my knowledge, the following plan is an eligible retirement plan.
<input type="checkbox"/>	The rollover should be directed to the following IRA. The IRA to which my rollover should be directed is a (check one): <input type="checkbox"/> Traditional IRA <input type="checkbox"/> Roth IRA

Employer Plan/IRA Information							
Name of Employer Plan or IRA				Account Number			
Address				City	State	Zip	
Contact Person				Contact Phone Number	()		

REQUIRED SPOUSE INFORMATION AND SIGNATURE (See below)

I understand that I am liable for all payment of federal income tax on the taxable portion of my distribution even if it exceeds the mandatory 20% income tax withheld. I may also be subject to penalties under the estimated tax payment rules if my payments of estimated tax and withholding, if any, are not adequate.

Social Security Number	-	-					
First Name		Initial		Last Name		Suffix	
Address				City	State	Zip	
Home Phone/Cell	()			Work Phone	()		

Signature of Spouse	Date
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