

Building Trades United Pension Trust Fund

ELECTION OF PAYMENT FOR LUMP SUM BENEFITS: NON-SPOUSE BENEFICIARIES

Applicant's Name _____ Social Security # _____

I acknowledge receiving the Special Tax Notice regarding Plan payments from the Fund's Board of Trustees. My choice, as shown below, is based on the information in the Special Notice.

I direct and authorize the Trustees to:

_____ pay _____% of the lump sum benefit directly to me. I understand that 20% of the percentage marked here will be withheld for Federal Income Tax withholding. Also, withhold _____% for Wisconsin income tax withholding.

_____ rollover _____% of the lump sum benefit directly to my Individual Retirement Account (IRA). I have provided the necessary information on the lines below to proceed with this payment.

— Complete this section for rollover to an Individual Retirement Account (IRA) —

Name of institution at which IRA is maintained _____

Name of specific mutual fund _____

Address of institution _____

Name(s) in which IRA is maintained _____

Account number _____

All applicants must sign below.

I hereby certify that the information entered on this form is true, correct, and complete.

Applicant's Signature _____ Date _____