

**CUMBERLAND
PRESBYTERIAN
CHURCH
RETIREMENT
PLAN NUMBER
TWO**

**APPLICATION FOR LUMP SUM WITHDRAWALS
FOR RETIRED PARTICIPANTS**

**I HEREBY CERTIFY THAT I ELECT TO WITHDRAW A LUMP SUM AMOUNT FROM
MY RETIREMENT ACCOUNT AS SPECIFIED BELOW:**

You may receive your funds by check or direct deposit to your checking or savings account.

- Please specify which method you wish below. Also please note when requesting funds that 20% is taken out and sent to the IRS for taxes by our Trustee, PRINCIPAL FINANCIAL SERVICES. At year end (usually by the end of January) you will receive a 1099R form from PRINCIPAL noting the total yearly withdrawals made.

-DIRECT DEPOSIT

You may include with this application a voided personal check form directing where the funds are to be sent or you may fill out the required information below.

YOUR NAME- _____

BANK NAME- _____

ROUTING NUMBER- _____

ACCOUNT NUMBER- _____

GROSS AMOUNT-\$ _____ **SIGNATURE-** _____

SOCIAL SECURITY NUMBER- ____ - ____ - ____ **DATE** ____/____/____

-CHECK SENT TO YOUR HOME

YOUR NAME&ADDRESS _____

CITY- _____ **STATE-** _____ **ZIP CODE-** _____

AMOUNT-\$ _____ **SIGNATURE-** _____

SOCIAL SECURITY NUMBER- ____ - ____ - ____ **DATE** ____/____/____

ADMINISTRATOR ACKNOWLEDGEMENT-The undersigned duly authorized representative of the Board of Stewardship hereby acknowledges receipt of the forgoing application and approves such benefit request: _____ **DATE** _____