



RETURN OF EXCESS CONTRIBUTIONS

Pension Fund Name: _____

Member's Legal Name (include middle initial): _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone Number: _____ Cell Phone Number: _____

Email Address (Please Print Clearly): _____

TOTAL EXCESS CONTRIBUTIONS

Pre-Tax Contributions - Payroll	\$
After-Tax Contributions - Payroll	\$
Total Excess Contributions	\$

I have received from the Pension Fund the "Special Notice Regarding Plan Payments – Contribution Refunds". I understand that if the excess contributions were withheld on a Pre-Tax basis (indicated above), they will be reported as taxable income by the Pension Fund through a 1099-R for the calendar year in which I receive the disbursement (however they are not subject to any early withdrawal penalties and will be coded accordingly on the 1099-R). I further understand that it is my responsibility to include this payment as taxable earnings when I file my personal income tax return for the year in which I received the disbursement.

Member's Signature: _____ Date: _____

Pension Fund Trustee Signature: _____ Date: _____

Contact the Benefits Administration Hotline at 866.952.6329 if you have any questions.