



# CHURCH OF THE BRETHREN PENSION PLAN

a not-for-profit ministry of Church of the Brethren Benefit Trust, Inc.  
1505 Dundee Avenue, Elgin, IL 60120-1619  
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www.brethrenbenefittrust.org

## Request for Annuity Projection

**Complete and return to the address above:**

_____			_____
<i>name</i>			<i>social security number</i>
_____			_____
<i>address</i>			<i>date of birth</i>
_____	_____	_____	_____
<i>city</i>	<i>state</i>	<i>zip code</i>	<i>daytime phone number</i>

Anticipated date(s) annuity would begin \_\_\_\_\_

*month*                      *day*                      *year*

\_\_\_\_\_

*month*                      *day*                      *year*

Will contributions continue to above date(s)?    yes                       no

If "no," give date contributions will stop \_\_\_\_\_

Spouse's name \_\_\_\_\_

Spouse's birthdate \_\_\_\_\_

Please select only one of the following projections to be calculated:\*

**1. Monthly annuity without lump sum withdrawal of personal account:**

- |  |  |
|--|--|
| <input type="checkbox"/> single life annuity | <input type="checkbox"/> 75% spouse annuity  |
| <input type="checkbox"/> 50% spouse annuity  | <input type="checkbox"/> 100% spouse annuity |

**2. Select only one from a or b:**

**a. Monthly annuity with lump sum withdrawal of all personal account:**

**b. Monthly annuity with a partial lump sum withdrawal of \$\_\_\_\_\_ from personal account:**

- |  |  |
|--|--|
| <input type="checkbox"/> single life annuity | <input type="checkbox"/> 75% spouse annuity  |
| <input type="checkbox"/> 50% spouse annuity  | <input type="checkbox"/> 100% spouse annuity |

**3. Monthly annuity leaving personal account active at BBT:**

- |  |  |
|--|--|
| <input type="checkbox"/> single life annuity | <input type="checkbox"/> 75% spouse annuity  |
| <input type="checkbox"/> 50% spouse annuity  | <input type="checkbox"/> 100% spouse annuity |

**4. Monthly annuity with partial lump sum withdrawal of \$\_\_\_\_\_ from personal account, leaving the remaining personal account active at BBT:**

- |  |  |
|--|--|
| <input type="checkbox"/> single life annuity | <input type="checkbox"/> 75% spouse annuity  |
| <input type="checkbox"/> 50% spouse annuity  | <input type="checkbox"/> 100% spouse annuity |

\* For information about these payment options, see your Pension Plan Participants' Handbook.