



INSTRUCTIONS: Please read the IMPORTANT INFORMATION SECTION on Page 2.

1. **Complete the application in blue or black ink.** Incomplete applications will result in a delay or cancellation of your request.
2. **Sign the application in the presence of a notary.** Only applications with original ink signatures will be accepted.
3. **Mail or drop off your application at our office.** Copied, faxed, or emailed applications will not be accepted.

PERA
60 Empire Drive, Suite 200
Saint Paul, MN 55103-2088

PART A – YOUR INFORMATION

| | | | | | |
|------------------|-----------------------|-----------------------------|------|---|----------|
| LAST NAME | | FIRST NAME & MIDDLE INITIAL | | PERA ID NUMBER | |
| ADDRESS–STREET | | | CITY | STATE | ZIP CODE |
| LAST FOUR OF SSN | BIRTH DATE–MM/DD/YYYY | PRIMARY PHONE NUMBER | | <input type="checkbox"/> Check box if this is a change of address | |

Check all applicable boxes. If no boxes are checked, all plans will be refunded.

☐ Coordinated or Basic Plan ☐ Police & Fire Plan ☐ Correctional Plan ☐ Defined Contribution Plan ☐ All PERA Plans

PART B – YOUR OPTIONS

Choose one of the options below. All refunds will be mailed to you at the address provided above. If you choose a rollover option, IRS regulations require you to deposit the rollover check with the qualified plan/IRA within 60 days of issuance of the check. If no option is selected, PERA will pay as a regular refund with taxes withheld.

☐ **REFUND: entire amount payable to me** (taxes withheld)

☐ **ROLLOVER: entire amount payable to qualified plan/IRA**

NAME OF COMPANY RECEIVING ROLLOVER (E.G. VANGUARD, FIDELITY, ETC.)

☐ Check if
Roth IRA

☐ **SPLIT REFUND/ROLLOVER: partial amount payable to me, remainder payable to qualified plan/IRA**

AMOUNT PAYABLE TO ME (IN WHOLE DOLLARS)

\$

NAME OF COMPANY RECEIVING REMAINDER

☐ Check if
Roth IRA

Taxes withheld from this amount

If the qualified plan/IRA is not provided, PERA will pay entire amount as a regular refund with taxes withheld

PART C – TAXES

Refunds paid directly to you are subject to federal taxes and state taxes (based on your residency). We can withhold state taxes for MN residents; if you are a non-MN resident, contact your state for tax requirements.

PERA can withhold the default tax amount OR you can complete the tax form(s) to withhold a different amount.

» **Option 1 – Default Tax Withholding/No Tax forms**

If no tax forms are submitted with your application, PERA will automatically withhold:

- Federal: 20% (10% non-spouse)
- MN State (MN residents only): 6.25%

» **Option 2 – Complete Tax Forms**

To withhold a tax amount other than the default, you will need to submit a signed/completed Federal W-4R and/or Minnesota W-4MNP with your application.

- Federal – W-4R: You can elect to withhold more than the 20% required minimum of your refund.
- MN State – W-4MNP (MN residents only): You can make any tax selection, including no withholding.

PART D— THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC

By signing, I agree to the following: 1) I understand the tax consequences of taking a refund; 2) By law PERA has up to 120 days after receipt of this application to process my refund; 3) I have received the *Tax Notice About Your Rollover Options* within the last 180 days and waive the required time period I have to review this notice.

Subscribed and sworn to before me this _____ Day of _____, Year _____

SIGNATURE OF NOTARY

Notary Public of _____ County.

My Commission Expires _____

(NOTARY SEAL REQUIRED)

SIGNATURE OF APPLICANT

PRINTED NAME OF APPLICANT

IMPORTANT INFORMATION

DATA PRIVACY NOTICE: PERA is asking for private data in order to process your request. You are not legally required to provide this information and may refuse to provide all or some of the information requested. However, PERA may not be able to process your request if you do not provide sufficient information. Unless you consent to further release of your private data, access to this information will be limited to the PERA staff who process your request. Your private data may also be released if required or authorized by state or federal law or by a court order.

TAX NOTICE ABOUT YOUR ROLLOVER OPTIONS. Under § 402(f) of the Internal Revenue Code (“Code”), PERA is required to provide certain information to any recipient requesting an eligible rollover distribution. Please read the enclosed publication, *Tax Notice About Your Rollover Options*, to learn more about your options. In addition, the Code requires that a member receive the notice no less than 30 days and not more than 180 days prior to requesting a distribution.