



## **BAY AREA PAINTERS AND TAPERS**

### **PENSION AND ANNUITY TRUST FUNDS**

4160 Dublin Boulevard, Suite 400

Dublin, CA 94568-7756

Toll Free: (866) 894-3705 \* Fax: (925) 833-7301

Email: [Paintersinfo@hsba.com](mailto:Paintersinfo@hsba.com)

Website: [www.bayareapainterstrust.org](http://www.bayareapainterstrust.org)



## **INSTRUCTIONS FOR COMPLETING AN ALTERNATE PAYEE APPLICATION**

Complete the application in its entirety. Please file the application promptly with the Trust Fund Office even though you may need more time to obtain some of the required attachments. Forward the necessary documents to the Trust Fund Office as soon as possible.

**Your application cannot be processed without the following document(s):**

A) Copy of Proof of Age for yourself (see instructions below).

### **INSTRUCTIONS CONCERNING SUBMISSION OF PROOFS OF AGE**

**IMPORTANT: The Trust Fund will verify the identity of a Member and Spouse who submit a retirement application through one of the following methods:**

- **Method 1:** Submit birth certificate(s) and a copy of your current and unexpired government issued photo identification (e.g. driver's license, military identification, or passport); or
- **Method 2:** Submit a signed and notarized application with a copy of either: your Birth certificate, or a copy of your issued identification (e.g. driver's license, military identification, or passport); or
- **Method 3:** Submit an application **in person** to the Trust Fund Office with current and unexpired government issued photo identifications (e.g. driver's license, military identification, or passport) for yourself.

**If you are unable to verify your identity using the above methods, you may request an appeal through the Trust Fund. Appeals will be forwarded to the Plan's legal counsel for review.**



# BAY AREA PAINTERS AND TAPERS

PENSION AND ANNUITY TRUST FUNDS

4160 Dublin Boulevard, Suite 400

Dublin, CA 94568-7756

Toll Free: (866) 894-3705 \* Fax: (925) 833-7301

Email: [Paintersinfo@hsba.com](mailto:Paintersinfo@hsba.com)

Website: [www.bayareapainterstrust.org](http://www.bayareapainterstrust.org)



## APPLICATION FOR PENSION BENEFITS ALTERNATE PAYEE

**INSTRUCTIONS:** Type or print all information. Be sure to sign and date the application.

### I. PARTICIPANT INFORMATION

\_\_\_\_\_  
Last Name of Participant      First Name      MI      Social Security Number

\_\_\_\_\_  
Date of Birth

### II. ALTERNATE PAYEE INFORMATION \*\*\*As your name on your birth certificate may differ from your current name, please submit a written explanation clarifying the difference, for auditing purposes.\*\*\*

\_\_\_\_\_  
Last Name of Alternate Payee      First Name      MI      Social Security Number

\_\_\_\_\_  
Address      Date of Birth

\_\_\_\_\_  
City, State and Zip Code      Telephone Number

I certify under penalty of perjury that I am the ex-spouse of the above named individual and hereby apply for Retirement Benefits which have been awarded to me through the Qualified Domestic Relations Order payable from the Bay Area Painters and Tapers Pension Trust Fund. I understand that a false statement may disqualify me for benefits and that the Trustees shall have the right to recover any payments made to me because of a false statement.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### GENERAL ACKNOWLEDGMENT – NOTARIZATION

**(ONLY COMPLETE NOTARIZATION IF YOU ARE USING "METHOD 2" TO VERIFY YOUR IDENTITY.)**

State of \_\_\_\_\_ County of \_\_\_\_\_

On \_\_\_\_\_, before me, \_\_\_\_\_, who  
Notary Public, personally appeared \_\_\_\_\_, and \_\_\_\_\_, who  
proved to me on the basis of satisfactory evidence to be the person whose name is subscribed to the within instrument  
and have acknowledged to me that they executed the same in their authorized capacities, and that by their signature on  
the instrument, the persons, or the entity upon behalf of which the persons acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of \_\_\_\_\_  
that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

\_\_\_\_\_  
Notary's Signature