

# MEBA - 401(k) Plan

1007 Eastern Avenue, Baltimore, MD 21202-4345  
(410) 547-9111 or (800) 811-MEBA (6322)

## DISTRIBUTION DUE TO DEATH APPLICATION

### Part 1: Employee Information

Social Security #: --  
Date of Birth: -- (Month, Day & Year)  
First Name & M.I.:   
Last Name:

Death Benefit (Please provide a copy of the death certificate)

Date of Death: -- (Month, Day & Year)

### Part 2: Method of Payment - Beneficiary Payout Only (Not a Beneficiary Designation):

- **Rollover all or a percentage to an IRA or Qualified Plan Sponsor (Available to Spouse only)**

I would like to rollover the following percentage of my taxable portion of this distribution: %  
**Choose only one:**

- Fidelity Rollover IRA (Application available in the Retiree Distribution Options Guide-if this option chosen, must be completed)
- Qualified Retirement Plan at another Employer
- IRA Outside Fidelity Name of Outside IRA Trustee or Qualified Plan Sponsor: \_\_\_\_\_

**\*\*Check will be made payable to the new IRA Trustee or Qualified Plan Sponsor, but must be mailed to the address you have on file with the Plan Office. It will be your responsibility to forward the check to the outside IRA Trustee or Qualified Plan Sponsor. IRS guidelines require that you rollover your distribution within 60 days to rollover this distribution to avoid tax penalties. \*\***

Date account established -- (Month, Day & Year)

**NOTE: No taxes will be withheld from the taxable portion of the distribution that is rolled over into another Qualified Plan or IRA.**

- **Payout (Available to Spouses and Non-Spousal Beneficiaries)**

I would like the following percentage of my taxable portion of this distribution in a check payable to me: %

Please withhold % federal taxes. (If you do not indicate a higher percentage, a minimum of 20% federal taxes will be withheld).

Distribution may be subject to a mandatory withholding of state taxes.  **Do Not** withhold state taxes (or)  **Do** withhold state taxes

**NOTE: If you do not roll over 100% of your withdrawal into another Qualified Plan or IRA, 20% federal tax and applicable state taxes, if required, will be withheld from the taxable portion of the distribution eligible for rollover but not rolled over into another Qualified Plan or IRA.**

Should you elect to have your distribution paid as both a cash distribution and rollover, your percentage must total 100%.

### Part 3: Beneficiary Information

**Multiple Beneficiaries must complete separate distribution forms. All forms must be submitted simultaneously to Fidelity by Plan Office.**

Social Security #: --  
Date of Birth: -- (Month, Day & Year)  
First Name & M.I.:   
Last Name:   
Street Address:   
Apt. No. :  New Address:  Yes  No  
City:   
State:  Zip: -  
Daytime Phone: --  
Evening Phone: --

### Part 4: Signature

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATED

\_\_\_\_\_  
PLAN OFFICE APPROVAL

\_\_\_\_\_  
DATED