

Your defined benefit plan

Consider options for your pension plan benefit



Washington Township Health Care District Retirement Plan

Transamerica is committed to making your transition to retirement a seamless and stress-free experience. Please review the following information to help make the most of your well-deserved benefit:

1. Approximately six months before your expected termination date:

Visit transamerica.com/portal to request a retirement initiation package or call **888-976-8196** to speak with a Transamerica Retirement Counselor.

2. After your initial contact with Transamerica:

- You will receive a retirement package outlining your next steps. It will include a Retirement Application explaining your benefit options along with the corresponding amount for each choice.
- Use these forms to select your benefit option, tax withholding preferences, and direct deposit instructions. The *Special Tax Notice Regarding Plan Payments* is required disclosure information you should read before making any elections. This package will also request supporting documents Transamerica needs to verify certain information. Benefit payments may not begin until the following supporting documents are received:

A. Proof of your age*

- Copy of birth certificate
- Copy of valid passport
- Copy of armed services discharge papers

B. Proof of your spouse's/beneficiary's age (as applicable)*

- Copy of spouse's/beneficiary's birth certificate
- Copy of spouse's/beneficiary's valid passport
- Copy of spouse's/beneficiary's armed services discharge papers

C. Proof of marital status*

- Copy of certified marriage certificate
- Copy of spouse's death certificate
- Copy of divorce decree

*Please provide at least one document for each requirement

Important: Do not complete the paperwork if your pension start date is incorrect. Contact Transamerica for new paperwork with a corrected start date.



3. After receiving your retirement package, complete and return before elected payment start date:

Transamerica will initiate any required payments within four to six weeks after your Benefit Commencement Date. Transamerica will need your completed Retirement Application, supporting documentation, and your final termination date from your employer – prior to initiating payment. If you elected to receive your benefit as an annuity, subsequent monthly payments will be scheduled for the first of each month. Please note, if you return your paperwork after the elected start date, your benefit may need to be recalculated for a future Benefit Starting Date.

4. After you retire:

Once your retirement benefits begin, updates such as your contact information and mailing address, direct deposit instructions, and tax withholding elections can be completed online. For inquiries regarding lost or stolen checks, death notifications, and general account questions, call Transamerica at **888-976-8196**.



Get in touch



Call: **888-976-8196**



Visit **transamerica.com/portal**

Transamerica Retirement Solutions (TRS) is affiliated with Transamerica Trust Company (TTC) through which TRS provides certain investment education services to plan participants and other administrative services on behalf of the plan. TTC is an Iowa trust company with its principal office located at 6400 C Street SW, Cedar Rapids, IA 52499. All Transamerica companies identified are affiliated but are not affiliated with your employer.

This information is provided as a guide to the retirement benefit commencement process. Time frames provided are estimated, assuming an employment termination date of the first day of the month. Actual time frames may vary.