

Pre - Retirement Death Benefit Checklist

- _____ Salary sheet (active or terminated participant)
- _____ Death certificate of Participant
- _____ Proof of Birth for Participant (as shown on acceptable proof of date of birth list)
- _____ Pre-Retirement Beneficiary Retirement Form
- _____ Copy of Marriage Certificate (if participant was married at time of death)
- _____ Proof of Birth for Beneficiary (as shown on proof of date of birth list)
- _____ Copy of Social Security Number (card) of Beneficiary
- _____ Current Mailing address of Beneficiary
- _____ Signature on Direct Deposit form (if applicable)
- _____ Voided Check for Direct Deposit form (if applicable)
- _____ Federal and State tax forms (if applicable)

PLEASE NOTE: Completed documents must be in our office no later than the fifth (**5th**) of each month in order for payment to be made at the end of the month. If you should have any questions please contact Tamika Scott at 678-686-6262