

LAR PENSIONS, LLC

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DISTRIBUTION REQUEST – 401(K) PLAN

Terminated Participant Information for 401(k) and 401(k) Safe Harbor Plans

Name of Employer: _____
401(k) _____ 401(k) Safe Harbor _____

Participant's Name: _____

Address: _____

Phone Number: _____

Social Security Number: _____

Date of Hire: _____

Date of Birth: _____

Date of Termination _____

Hours Worked in Final Plan Year: _____

***Attach final pay stub reflecting total wages for the year for terminated employees.**

Retirement Plan Distributions should not be made to participants until the final valuation is complete for the year of termination. Often there are employer contributions to be made on behalf of terminated employees that are not required to be funded until the following plan year. The exact amount of contributions due to terminated employees cannot be known until all discrimination testing has been processed and the valuation is complete.

Should a terminated employee who worked less than a 1000 hours request a distribution from a 401(k) Plan the above must be completed. Please note that for Safe Harbor Plans, the required contribution must be deposited prior to the distribution. Else the participant is to be charged for two (2) distribution packages. We will notify you with the amount to be deposited for the safe harbor contribution to avoid doing two distributions.