

APPLICATION SUMMARY FOR SPOUSE ANNUITY

Employee's Name	John Public
RR Claim No.	A 123-45-6789
Social Security Number	123-45-6789
Date of Birth	01/02/1940

The following information was either supplied by or verified by you in support of your application for a Spouse Annuity under the Railroad Retirement Act. After you have reviewed the information, make any changes on the summary, initial the change and sign the certification on the last page. Return the certification and all pages of the summary to the RRB.

Applicant Information

Name and Address	Jane Public 844 N. Rush Street Chicago, IL 60611
Daytime Telephone Number	555-555-1212
Social Security Number	111-22-3333
Date of Birth	02/20/1942
Type of Application Filed	Spouse Annuity

You have requested that any payment due you be sent using the Direct Express® Debit MasterCard®. Payments will be sent to the address shown above until the card is issued.

Applicant's Marriages

You are currently married to or separated from the employee.

You were not married before your marriage to the employee.

Criminal Offense Information

Within the past 12 months you have not been imprisoned or given a sentence of confinement due to a conviction for a criminal offense.

Other Government Benefits

You have not filed nor do you plan to file in the next three months for social security benefits on any account number.

You are not receiving a social security benefit.

In the past month you have not filed nor do you plan to file in the next three months for railroad retirement benefits on any other account number.

You are not receiving a railroad retirement annuity.

You are not receiving nor do you expect to receive a pension or lump-sum payment based on your earnings from a Federal, state or local government agency.

Earnings Information

In 2013, you expect your total earnings will be less than \$14,640.

Railroad Work and NonRailroad Work

You have not worked for a railroad, railroad labor organization or other employer in the railroad industry.

You worked for the following employer(s) outside the railroad industry in the six months before you expect your annuity to begin:

Jive Records from 04/28/1993 to 01/20/2006

Beginning Dates and Filing Dates

You have requested your annuity begin on the earliest date permitted by law, even if you will receive a reduced annuity.

You do not want this application to protect your filing date for social security benefits.

Application for a Spouse Annuity - Certification

Employee's RR Claim Number	A 123-45-6789
Employee's Name	John Public
Employee's Social Security Number	123-45-6789

Applicant's Name	Jane Public
Applicant's Social Security Number	111-22-3333

I certify that the information I have given to the Railroad Retirement Board (RRB) in relation to this application is true to the best of my knowledge. I know that if I make a false or fraudulent statement or withhold information, in order to receive benefits from the

RRB, I am committing a crime under Federal law, which may be punishable by fines, imprisonment or both.

I have received and reviewed a summary of the information I provided. I understand that I have an obligation to advise the RRB immediately if there are any errors in the summary I received, and I have made and initialed any corrections on the summary being returned to the RRB.

I have received and reviewed the booklets RB-30, *Spouse Annuity*, and RB-9, *Employee and Spouse Annuities - Events that Must be Reported*, and Form G-77a, *How Work Affects Your Railroad Retirement Benefits*. I understand that I am responsible for reporting events that would affect my annuity as explained in the booklets and form. Failure to report any of the events listed below or other events that may affect my annuity, may result in a penalty deduction from my annuity, as well as criminal and/or civil prosecution.

I agree to immediately notify the RRB, if

- My marriage to the employee ends in death or divorce.
- I receive a lump-sum payment or begin to receive a monthly pension based on my earnings from a Federal, state or local government agency.
- I file for social security benefits on **any** person's earnings record.
- I go to work for a railroad or railroad labor organization or work in any capacity in the railroad industry.
- I return to work for Jive Records.
- I earn over the annual earnings exempt amount.
- I perform work, including self-employment, for a family owned, controlled or managed business, including a business operated, managed or owned by me, a family member, friend or close associate, whether for pay or not, and without regard to how the business is organized (e.g., sole proprietorship, partnership, corporation, LLC, etc.).
- I become a corporate officer of, own or operate a corporation (including a corporation owned by a family member or friend), whether for pay or not.
- I receive anything of value in lieu of salary or wages for any work that I perform.
- My address changes.
- My financial organization or the account number of my financial organization changes.
- I am confined in a jail, prison, penal institution, or correctional facility due to a conviction for a criminal offense.

Signature (First Name, Middle Initial, Last Name)

Date (Month/Day/Year)

If this certification is signed by mark ("X"), two witnesses who know the person signing must sign below, giving their full addresses and daytime telephone numbers.

Signature of Witness

Address (Street, City, State and ZIP Code)

(_____)_____
Daytime Telephone Number

Signature of Witness

Address (Street, City, State and ZIP Code)

(_____)_____
Daytime Telephone Number