# Social Security Administration
# **Potential Private Retirement Benefit Information**

Social Security Number:

Name:

The worker identified at the top of this form MAY be entitled to retirement benefits from a private-sector employer or union. Also, the worker's family may be eligible for retirement or survivor benefits.

**If You Have Questions or Want to Apply for These Retirement Benefits:**

- Contact the Plan Administrator shown below.
- If you cannot locate the Plan Administrator, contact your former employer or union that offered the plan shown below.
- Include a copy of this notice when you contact the Plan Administrator.

You may not be eligible for additional benefits if you or the worker already received payments from this plan:

<table>
<tr><td rowspan="3">Plan Name</td><td colspan="2">Plan Number</td></tr>
<tr><td colspan="2">Identification Number</td></tr>
<tr><td>Year Reported</td><td>Estimated Amount</td></tr>
<tr><td rowspan="2">Plan Administrator and Address</td><td>Type of Benefit</td><td>Payment Frequency</td></tr>
<tr><td>Units or Shares</td><td>Value of Account</td></tr>
<tr><td colspan="3">IMPORTANT: See the other side of this page for an explanation of this information.</td></tr>
</table>

**These Are Not Social Security Benefits**

The Social Security Administration (SSA) does not make any decisions about the payment of these retirement benefits. The Plan Administrator manages them. SSA does not have any information about these benefits other than what appears above.

The Plan Administrator must provide information about such benefits to SSA through the Internal Revenue Service. SSA shares this information when a worker asks for it or files a claim for Social Security benefits.

**What are these Retirement Benefits?**

They are "deferred vested benefits." The worker previously earned retirement benefits from a job covered by the retirement plan named above.

For SSA Use Only:

# EXPLANATION OF INFORMATION

**YEAR REPORTED**

This is the year for which the Plan Administrator reported retirement plan information to the Internal Revenue Service.

**ESTIMATED AMOUNT**

This was the amount that would be paid under the plan then in effect. The actual amount could differ. If you have already received payments from the plan, the amount shown on this notice should be disregarded.

**TYPE OF BENEFIT**

The code listed identifies the type of annuity to be paid:

| | |
|---|---|
| **A** | A single payment of a lump sum |
| **B** | Annuity payable over a fixed number of years |
| **C** | Life annuity |
| **D** | Life annuity with period certain |
| **E** | Cash refund life annuity |
| **F** | Modified cash refund life annuity |
| **G** | Joint and last survivor annuity |
| **M** | Other (Type of annuity not reported) |

**PAYMENT FREQUENCY**

The code listed shows how often the estimated payments would be made under the plan:

| | | | |
|---|---|---|---|
| **A** | Lump Sum | **E** | Monthly |
| **B** | Annually | **M** | Other (Payment frequency not reported) |
| **C** | Semi-Annually | | |
| **D** | Quarterly | | |

**UNITS OR SHARES**

If the retirement amount is based on units or shares the number of units or shares will be shown. The number of shares will be shown followed by "S."

**VALUE OF ACCOUNT**

If shown, this indicates the value of the account at the time the worker stopped working under the plan or at the time the Plan Administrator reported the information.

**QUESTIONS OR COMPLAINTS**

The U.S. Department of Labor's Employee Benefits Security Administration (EBSA) administers certain provisions of the Employee Retirement Income Security Act of 1974.

EBSA can help you apply for these retirement benefits and:

- Locate your Plan Administrator.
- Answer questions about your claim for benefits.
- Resolve complaints about your private retirement plan.

Contact an EBSA Benefits Advisor for help through any of these options:

- Call toll-free 866-444-3272 (translation services available).
- Dial 711 to access a TTY-based Telecommunications Relay Services for those with a hearing or speech disability.
- Visit askebsa.dol.gov.
- Scan the QR code below.