

Study of Retired Members

Kindly complete and return this form to the Board of Pensions.

The Board uses this information to create a summary of retirement income and to forecast the needs that are addressed through the Assistance Program. The Assistance Program provides financial assistance to eligible retired church workers and their surviving covered partner when their retirement income is below set targets.

Individual information is used only within the Board of Pensions for pension and Assistance Program purposes. The information will not be disclosed to other organizations without your written authorization.

Member's name _____ SSN _____

Covered partner's name _____ SSN _____

Permanent mailing address _____

City _____ State _____ ZIP _____

Phone () _____ Email _____

Estimated Monthly Retirement Income

	Member	Covered Partner
Social Security income _____		
Pension from the Board of Pensions _____		
Other pensions/annuities _____		
Other income <i>(Please specify source.)</i> _____		

Total income _____		

Do you own your home? Yes No

Member's signature *(required)* _____ Date *(mm/dd/yyyy)* _____

Covered partner's signature _____ Date *(mm/dd/yyyy)* _____

Mail or fax this completed form to:

The Board of Pensions of the Presbyterian Church (U.S.A.)
2000 Market Street, Philadelphia, PA 19103-3298
800-773-7752 (800-PRESPLAN) Fax: 215-587-6215 pensions.org