



# Application Packet Cover Sheet

## Fire & Police Pension Association of Colorado

FPPAco.org • 5290 DTC Parkway, Suite 100 • Greenwood Village, Colorado 80111-2721  
(303) 770-3772 in the Denver Metro area • (800) 332-3772 toll free nationwide • (303) 771-7622 fax

For	<b>FPPA Members Who Have Received FPPA Approval</b>
For Their	<b>Disability Benefit or Survivor Application</b>
And Now Wish To	<b>Receive the Funds From Their Separate Retirement Account (SRA)</b>
	<p><b>This Packet Applies To:</b> Members who have received FPPA Board approval for their disability benefit or survivor benefits, and now wish to receive the funds in the Separate Retirement Account (SRA).</p> <p><b>Please Remember:</b></p> <ul style="list-style-type: none"><li>• complete all appropriate parts of the forms, and</li><li>• have your signature notarized.</li></ul> <p><b>Questions?</b> Contact an FPPA Death &amp; Disability Benefit Coordinator at the phone numbers listed above.</p> <p><b>Send all completed forms to:</b> FPPA Death &amp; Disability Benefit Coordinator at the address listed above.</p> <p><i>Please make copies for your files of the forms you fill out prior to submitting them to FPPA.</i></p>
<b>Forms &amp; Publications</b>	<p>In this application packet you will find the following forms and information needed to process your application. <b><i>Check the box to the LEFT as you complete each of the forms.</i></b></p>

### Instructions Memo

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Separate Retirement Account (SRA) Distribution Payment Option Selection |
| <input type="checkbox"/> | Form W-4P Refund of Contributions SRA or DROP Distributions             |
| <input type="checkbox"/> | Form W-9 Request Taxpayer Identification Number and Certification       |
| <input type="checkbox"/> | Withholding/Rollover Election Form For Eligible Rollover Distributions  |
| <input type="checkbox"/> | Electronic Funds Transfer/Direct Deposit                                |
| <input type="checkbox"/> | Special Tax Notice Regarding Plan Payments                              |



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## Instructions Memo

If you have received FPPA approval for disability or survivor benefits, you are now eligible to receive the funds in your Separate Retirement Account (SRA).

Following this document you will find additional tax information and the SRA distribution forms. Please read the Special Tax Notice Regarding Plan Payments carefully prior to completing the forms. The chart below will help you identify which forms need to be completed and returned to FPPA.

To Elect Direct **Receipt** of the Funds  
Complete and Return the Following Forms:

SRA Distribution Form

*Form W-4P*

*Form W-9*

Electronic Funds Transfer/Direct Deposit Form

To Elect a Direct **Rollover** of the Funds  
Complete and Return the Following Forms:

SRA Distribution Form

Withholding/Rollover Election Form

### If you have received FPPA approval for taxable (off-duty) disability or survivor benefits:

The entire balance in your SRA is taxable and is, therefore, eligible for a rollover to another eligible employer plan, traditional IRA or tax-sheltered annuity. Eligible employer plans include: 401(a), 401(k), 403(b), and 457(b) (governmental plans only). An eligible employer plan is not legally required to accept a rollover. Before you decide to roll over your SRA to another eligible employer plan, you should find out whether the plan accepts rollovers and, if so, the types of distributions it accepts as a rollover. You should also find out about any documents that are required to be completed before the receiving plan will accept a rollover. Your SRA is a 401(a) retirement plan.

If you elect to roll over part or all of your eligible rollover distribution, you will receive a check for the amount of the rollover, made payable to the trustee of your new plan. If you are rolling your SRA to Fidelity, FPPA will roll the funds for you. You will then be responsible for delivering the check(s) to your new plan. Any portion of your SRA which is not rolled over will be paid to you in accordance with your payment option, less any withholding.

If FPPA does not receive a completed Withholding/Rollover Election Form with your SRA Distribution Form, we will assume you do not want to roll over any portion of your eligible rollover distribution and we will make payments to you in accordance with your payment option selection, less any withholding.

When all the necessary forms are returned, and after your final contribution is received, FPPA will begin processing your payments. If you have any questions or if you wish to discuss this information further, feel free to call a Death & Disability Benefit Coordinator at (303) 770-3772 in the Denver Metro area or (800) 332-3772 toll free nationwide.

### If you have received FPPA approval for non-taxable (on-duty) disability or survivor benefits:

Following this memorandum, you will find the forms necessary for distribution of funds. When all the necessary forms are returned, and after your final contribution is received, FPPA will begin processing your payments. If the disability or death has been determined by FPPA to be due to an on-the-job injury or condition, the SRA will be non-taxable.

We realize this may not be an easy process to go through, so please feel free to call in your have questions or concerns at 303-770-3772 or 1-800-332-3772.