



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	Members of the Statewide Defined Benefit Plan Who Have Received FPPA Approval														
For Their	Retirement Application														
And Now Wish To	Receive the Funds From Their Separate Retirement Account (SRA)														
	<p>This Packet Applies To: Members who have received FPPA approval of their retirement application and now wish to receive the funds in their Separate Retirement Account (SRA).</p> <p>This Packet Does NOT Apply To: This packet does NOT apply to members who transferred the SRA to Fidelity Investments or for members who are using their SRA to purchase a monthly lifetime benefit. For distribution of these funds, please contact Fidelity at 1(800) 343-0860.</p> <p>Please Remember: Complete all appropriate parts of this application and have your signature notarized.</p> <p>Questions? Contact an FPPA Retirement Coordinator at the phone numbers listed above.</p> <p>Send all completed forms to: FPPA Retirement 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>														
Forms & Publications	<p>In this application packet you will find the following forms and information needed to process your application. Check the box to the LEFT as you complete each of the forms.</p> <table><tr><td></td><td>Instruction Memo</td></tr><tr><td><input type="checkbox"/></td><td>Separate Retirement Account (SRA) Distribution Payment Option Selection</td></tr><tr><td><input type="checkbox"/></td><td>Form W-4P Refund of Contributions SRA or DROP Distributions</td></tr><tr><td><input type="checkbox"/></td><td>Form W-9 Request Taxpayer Identification Number and Certification</td></tr><tr><td><input type="checkbox"/></td><td>If Electing a Rollover of the Funds (See the next page for instructions.) Withholding/Rollover Election Form For Eligible Rollover Distributions</td></tr><tr><td><input type="checkbox"/></td><td>If Electing a Direct Receipt of the Funds (See the next page for instructions.) Electronic Funds Transfer/Direct Deposit</td></tr><tr><td></td><td>Special Tax Notice Regarding Plan Payments</td></tr></table>		Instruction 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"/>	If Electing a Rollover of the Funds (See the next page for instructions.) Withholding/Rollover Election Form For Eligible Rollover Distributions	<input type="checkbox"/>	If Electing a Direct Receipt of the Funds (See the next page for instructions.) Electronic Funds Transfer/Direct Deposit		Special Tax Notice Regarding Plan Payments
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Instructions Memo

If you are a member of the Statewide Defined Benefit Plan and have received FPPA Board approval of your retirement application, 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

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. You will then be responsible for delivering the check(s) to your new plan. If you are rolling your SRA to Fidelity, FPPA will roll the funds for you. 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 the Retirement Coordinator at (303) 770-3772 in the Denver Metro area or (800) 332-3772 toll free nationwide.