



**COUNTY OF RIVERSIDE
 TEMPORARY/PART-TIME EMPLOYEES'
 401(A) RETIREMENT PLAN**

Monthly Retirement Benefit Distribution Request Form

Retirement Division (951) 955-4981, Option 2 • Email retirement@rivco.org
 Fax (951) 955-8538

SECTION I Participant Information (Please print or type)

Participant Name:		Social Security #:	
Mailing Address, check if new address <input type="checkbox"/> :	City:	State:	Zip:
Email address:	Daytime Phone:	Evening Phone:	
Date of Birth (mm/dd/yyyy):	Date of Hire (mm/dd/yyyy):	Date of Separation (mm/dd/yyyy):	

SECTION II Participant Authorization

Please read the following information and sign below to certify your distribution election.

IRS regulations require us to give you at least 30 days from the date you receive this notice to decide how you want your retirement benefit distributed. You may be able to receive your benefit sooner if you waive this right. Please note that it generally takes at least 30 days to process the Retirement Plan distributions. If you wish to waive the 30-day waiting period to receive your benefit, please initial here: _____.

Your signature below certifies that you received this *Monthly Retirement Benefit Distribution Request Form* at least 30 days before your retirement plan distribution date or that you waive the 30-day waiting period and elect to receive your distribution as soon as administratively possible. It further certifies that prior to making my election and signing this form, I understand that it is my responsibility to confer with my tax advisor as to my tax withholding election.

Participant Signature	Date (mm/dd/yyyy)
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In the event that you should pass way after retirement payments have begun, all payments from the plan will cease. This plan has no provision for a continuance to a surviving beneficiary.

Mail to: County of Riverside • Human Resources Retirement Division • P.O. Box 1569 • Riverside, CA 92502-1569

SECTION III Tax Withholding Election

Federal Income Tax Withholding Election

If the amount of your distribution is less than \$200, the County of Riverside is not required to withhold federal income taxes. However, if you do not elect to have federal tax withheld from your distribution or you do not have enough federal income tax withheld, you may be responsible for payment of estimated tax. You may also incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient.

If you elect to have federal income tax withheld from your distribution, the minimum amount to be withheld is 20% of your total taxable distribution. You may also elect to have an additional dollar amount above the 20% rate withheld. Put a check mark below next to the federal income tax withholding option you are electing for your partial or full lump sum distribution from the County of Riverside Temporary and Part-time Employees' Retirement Plan.

I understand that if I elect not to have federal income tax withheld, I am still liable for the payment of federal income tax on the taxable portion of my distribution. I am also aware that I may be subject to tax penalties under the estimated tax payment rules if my payments of estimated tax and withholding, if any, are not adequate.

I elect to have 20% withheld for federal income tax on my total taxable monthly distribution.

I elect to have 20% withheld for federal income tax on my total taxable monthly distribution plus an additional amount of \$ _____.

I elect not to have federal income tax withheld on my total taxable monthly distribution. (Applicable only if gross amount of benefit is less than \$200.00)

California State Income Tax Withholding Election

If you have elected to receive a partial or total lump sum distribution from the County of Riverside Part-time and Temporary Employees' Retirement Plan, the taxable portion of that benefit is subject to federal and California state income tax. California does not have a mandatory tax-withholding requirement. However, if you do not elect to have California tax withheld from your distribution or you do not have enough California income tax withheld, you may be responsible for payment of estimated tax. You may also incur penalties under the estimated tax rules if your withholding and estimated tax payments are not sufficient. Federal law prohibits states from taxing retirement income received by nonresident individuals, therefore, no California income tax is to be withheld from pension recipients who reside outside of California.

If you elect to have California state income tax withheld from your distribution, the minimum amount to be withheld is 2% of your total taxable distribution. You may also elect to have an additional dollar amount above the 2% rate withheld. Put a check mark below next to the California state income tax withholding option you are electing for your partial or full lump sum distribution from the County of Riverside Temporary and Part-time Employees' Retirement Plan.

I understand that if I elect not to have California income tax withheld, I am still liable for the payment of California income tax on the taxable portion of my distribution. I am also aware that I may be subject to tax penalties under the estimated tax payment rules if my payments of estimated tax and withholding, if any, are not adequate.

I elect not to have California state income tax withheld on my total taxable monthly distribution.

I elect to have 2% withheld for California state income tax on my total taxable monthly distribution.

I elect to have 2% withheld for California state income tax on my total taxable monthly distribution plus an additional amount of \$ _____.

I elect to have California state income tax withheld on my total taxable monthly distribution in a flat dollar amount of \$ _____.

Participant Name (please print) Participant Signature Date (mm/dd/yyyy)

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