

Benefits Center Retirement Initiation Worksheet (circle one) GM Delphi

Name: _____ SSN: _____

Retirement Date: ___/___/___ Last Day Worked: ___/___/___

DOB: ___/___/___ (Mon) (Day) (Year) Marital Status: married single

Retirement Type (Please Circle):

Payment option (Please Circle):

- 30 and out
- 85 points/60 and 10
- MSR – Mutual
- T&PD
- Deferred Vested

- Single Life Annuity
- 65% Surviving Spouse
- Contingent Annuitant
- 50% Joint and Survivor

Spouse/Contingent Annuitant Name: _____

SDOB: ___/___/___

Spouse/CA SSN: _____

| | |
|---------------------------------|---------------------------------|
| Fed Tax: Yes No | State Tax: Yes No |
| Single Married | Single Married |
| Married at single rate | Married at single rate |
| # of exemptions: _____ | # of exemptions: _____ |
| Additional dollar amount: _____ | Additional dollar amount: _____ |

Banking Information: Account Type Checking Savings

Routing #: _____ Bank Account #: _____

Name of Bank: _____

Deductions (Please Circle): UAW \$2.00
 IUE \$3.00
 Health Insurance Life Insurance
 United Way _____

Fidelity will

Mail to UBR (Union Benefit Rep) Yes No

Name of UBR: Frank Murray, Local 717, Warren, Ohio (330) 392-1591 Ext. 242