



# North Atlantic States Carpenters Annuity Fund

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## NORTH ATLANTIC STATES CARPENTERS ANNUITY CHANGE MONTHLY INSTALLMENT FORM

Please complete this form to make changes to the monthly withdrawal you are currently taking out of your Annuities. A participant shall have the right to increase the monthly payment once a year to any amount that is divisible by \$100.

At any time, a member can choose to discontinue monthly installment payments and make a one-time election to have the remaining balance paid in a single lump-sum. Please call the office to request an application and if choosing a rollover, you will need to provide the Letter of Acceptance from your Financial Institution.

Please check which account:

☐ Profit Sharing      ☐ Money Purchase

Current Monthly Annuity Withdrawal of:

\$	\$	\$	=	\$
GROSS	FEDERAL TAX	STATE TAX		NET

### CHANGES:

Please make the changes you would like in the boxes below. \*\*\* The Federal Tax has a mandatory 20% tax withholding unless the member is over age 70 or the payout extends for a period of 10 years or more.

Change Monthly Annuity Withdrawal to:

\$	\$	\$	=	\$
GROSS	FEDERAL TAX	STATE TAX		NET

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Last 4 of Social Security Number