

**RETIREMENT PLAN  
NOTIFICATION OF EMPLOYEE TRANSFER IN OR OUT**

\_\_\_\_\_ EMPLOYER NAME

\_\_\_\_\_ EMPLOYER MAILING ADDRESS  
\_\_\_\_\_

INSTRUCTIONS: Please complete the blank areas in the section below.

\_\_\_\_\_ began or will begin employment with  
(NAME OF EMPLOYEE) (SOCIAL SECURITY NUMBER)

\_\_\_\_\_, located at \_\_\_\_\_  
(NAME OF ASSOCIATION) (CITY, STATE)

on \_\_\_\_\_ He/She terminated employment at \_\_\_\_\_  
(DATE) (NAME OF CO-OP)

Located at \_\_\_\_\_ on \_\_\_\_\_  
(CITY, STATE) (DATE)

\_\_\_\_\_  
(SIGNED)

\_\_\_\_\_  
(TITLE)

---

TO EMPLOYER: To insure uniformity and fairness of treatment for employees transferring between participating employers, the following contribution rules should be observed.

- (1) If an employee transfers into your organization on or before the 15<sup>th</sup> day of any month, start immediately with the month of employment withholding a full month's contribution from his paycheck. Example: Employment date June 10; withhold June.
- (2) If the employee transfers into your organization after the 15<sup>th</sup> of any month, start withholding in the month following his month of employment. Example: Employment date, June 18; start withholding in July.
- (3) NOTE: To avoid a break in contributions, an employee transferring in after the 15<sup>th</sup> will be considered – for contribution purposes- to have been employed by his new employer on the 15<sup>th</sup> if ALL the following conditions exist:
  - (a) the 15<sup>th</sup> fell on a weekend or holiday
  - (b) the employee left his former employer on the day immediately preceding the weekend or holiday
  - (c) the employee began employment with his new employer the day immediately following the weekend or holiday
- (4) If your employee transfers out to another Plan employer, a monthly contribution will be due only if his last day of work was after the 15<sup>th</sup> of the month.

**Please mail or fax this form to: UNITED BENEFITS GROUP Fax: 816-459-8750  
PO BOX 169005  
KANSAS CITY, MO 64116**

