

CATHOLIC DIOCESE OF JACKSON  
MONEY PURCHASE PENSION PLAN

NOTICE OF PRE-RETIREMENT SURVIVOR ANNUITY

Adopting Entity: \_\_\_\_\_ Division #: \_\_\_\_\_

Employee: \_\_\_\_\_ Soc. Sec. #: \_\_\_\_\_  
(Last Name) (First Name) (Middle I.)

The purpose of this notice is to inform you of the disposition of your Account Balance in the above named Plan in the event you die prior to retiring or becoming disabled. If you are married, and if you die before attaining the age of thirty-five (35), one hundred percent (100%) of your Account Balance will be used to purchase a survivor annuity for your spouse. This annuity form of payment will provide your spouse with a series of payments over his or her life. The amount of these payments will depend on the amount in your account and the age of your spouse. The Plan Administrator can help you estimate the amount of the payments.

Beginning with the first day of the Plan Year in which you attain age 35 (or upon your termination of service if you are under age 35), you may elect to waive (a) the requirement that your death benefit be paid in the form of a survivor annuity, and/or (b) the requirement that your spouse be your beneficiary. You may elect another form of payment and designate a beneficiary. You may revoke any waiver any time before your death and make a new election. Your spouse must consent in writing before a plan representative or notary public to the waiver and the form of payment and beneficiary (beneficiaries) you elect. In the event you want to waive the Pre-Retirement Survivor Annuity form of payment and elect another form of payment or designate a beneficiary (beneficiaries) other than you spouse, ask the Plan Representative for an Election to Waive Pre-Retirement Survivor Annuity and Spouse's Consent to Waiver Form (Form #7).

If you are not married at the time of your death, the death benefit will be paid to your designated beneficiary in the form elected by you.

You and your spouse should fully understand your rights and obligations concerning your death benefit. All questions should be directed to the Plan Administrator. Also, because a spouse has certain rights to the death benefit, you must immediately inform the Plan Administrator of any change in your marital status.

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Participant Date

Submit Form To: Catholic Diocese of Jackson  
Department of Administration and Finance  
P. O. Box 2248  
Jackson, MS 39225-2248