



Title III: Benefits
Chapter TBD: TBD
Article TBD: TBD

Providing 1099R to a Third Party

Upon certification of the death of a member or pensioner (hereinafter “deceased”), the Pension Fund, upon request and confirmation of the appropriate status of the requester, will provide a copy of the deceased’s 1099R to:

- Spouse of the deceased
- Partner in a Civil Union of the deceased
- Child(ren) of the deceased
- Parent(s) of deceased
- Administrators and/or Executors of the Estate of the deceased upon receipt of valid Letters of Office of the Estate appointing the third party requester Administrator or Executor, which must be reviewed and approved by in-house counsel prior to providing the requested information.
- Trustees of the Decedent’s Trust upon receipt of a valid Trust and Affidavit of Trust, which must be reviewed and approved by in-house counsel prior to providing the requested information.

The third party requester must provide a valid federal or state-issued identification prior to receiving a copy of the 1099.