



Verification of Separation from Service

A change to 403(b) regulations, effective January 1, 2009, made it necessary that we obtain written verification from the employer when separation from service is necessary for a participant to qualify for a distribution. By obtaining written verification, we can assign the proper distribution code for IRS tax reporting.

We request the statement be written on school district letterhead. Please include the date of separation of service/retirement, a statement verifying that the participant has not returned to work, and the signature of an authorized school district employee. Please reference the example below.

We will keep your confirmation of employment termination in the participant's files; therefore, if your statement meets all the requirements, you will only need to send this information once. However, because the separation is considered permanent, if the participant returns to work in any capacity, it is the school district's responsibility to notify us of the employee's change of status. Employment status updates will be accepted via e-mail at memberbenefits@weatrust.com.

If you have any questions regarding the Verification of Separation from Service, please call 1-800-279-4030, Extension 8567, to speak with a Member Service Representative.

Sample

TO: WEA Trust Member Benefits
FROM: Employer Authorized/Contact Name, School District
RE: Participant/Employee Name
DATE: Date

The person referenced above is no longer an employee of School District. Their last day of employment was Date.

School District acknowledges that employment status affects the availability and IRS tax reporting of 403(b) distributions. School District will notify WEA Trust Member Benefits if Participant/Employee Name returns to work at School District.

Signature of Authorized
Employer Representative

Position Title