

Indiana State Teachers' Retirement Fund

Report Filed with the Indiana General Assembly

December 30, 2010

Pursuant to Indiana Code 4-1-8-7

Reason/Rationale for social security number requirement on forms/applications listed below: Because the payment of pension benefits is a taxable event, we must track and report payments to the Internal Revenue Service with the member's social security number.

TRF Forms With SSNs

1. [Retirement Application \(Printable\)](#)
2. [Affidavit of Applicant for Classroom Disability Benefit \(State Form 21703\)](#)
3. [Application for Surviving Dependent Pension Benefit \(State Form 44513\)](#)
4. [Application for Withdrawal from the Fund Due to Death of Member \(State Form 04717\)](#)
5. [Authorization to Release Confidential Info \(State Form 54304\)](#)
6. [Change of Address Form \(State Form Number Pending\)](#)
7. [Change of Beneficiary \(State Form 52332\)](#)
8. [Claim for Refund Due to Death of a Member or Death Settlement \(State Form 46461\)](#)
9. [Death Report Form \(State Form 50790\)](#)
10. [Enrollment Form for New Members \(State Form 37680\)](#)
11. [Irrevocable Election to Begin, Continue or Discontinue Retirement Benefits \(State Form Number 54275\)](#)
12. [Irrevocable Payroll Deduction Authorization for Pre-Tax ASA \(State Form 52595\)](#)
13. [Lump Sum Distribution Election for Surviving Spouse \(State Form 53931\)](#)
14. [Member Data Change \(State Form 43567\)](#)
15. [Power of Attorney \(State Form 49614\)](#)
16. [Request to Allocate and Accept Rollover Account \(State Form 52178\)](#)
17. [Request to Purchase Prior Military Service Credit \(State Form Number 54273\)](#)
18. [State and Local Tax Withholding Form \(Annuitant's Request for State and County Income Tax Withholding Monthly Benefit - WH-4P\)](#)
19. [Federal Tax Withholding Form \(Withholding Certificate for Pension or Annuity Payments W-4P\)](#)
20. [Affidavit for Direct Deposit of Retirement Benefit to a Revocable Trust \(State Form Number Pending\)](#)
21. [Affidavit for Estate Valued at \\$50,000 or Less \(State Form Number Pending\)](#)
22. [Application for Consent to Transfer \(State Form 48839\)](#)
23. [ASA/5 ASA/6 Post Retirement Election \(State Form 50798\)](#)
24. [Direct Deposit Form \(State Form 47144\)](#)
25. [Preliminary Estimate Request Retiree Change of Beneficiary/Survivor Beneficiary And/Or Retirement Option \(State Form 49513\)](#)
26. [Social Security Consent Form \(State Form 50824\)](#)

27. [Five-Year Distribution Of The Annuity Savings Account To A Deceased Member's Surviving Beneficiary \(State Form 54305\)](#)
28. [Withholding Election for Payees of Death Settlement or Distribution Payments \(State Form 07993\)](#)