MetSelect - TPA Distribution Transmittal Form for Death Benefits

Section 1 - Instructions

This form authorizes the liquidation of plan assets for the purposes of making a distribution upon the death of a participant. Upon completion of the appropriate sections, the completed form will need to be submitted to MetLife for processing. The form must be submitted to MetLife through the RetireLink web site, at www.RetireLink.com. Please refer to your TPA Guide or contact your Account Executive for additional information.

Section 2 - Plan Information

Plan Name	Plan ID Number	Location Code

Section 3 - Participant Information

Last Name	First Name	Middle Initial	Social Security Number
Address *(street, city, state, zip)*			Date of Death

Section 4 – Beneficiary Information

Complete a section for each beneficiary. All checks will be mailed to the beneficiaries' home.

Last Name	First Name	Middle Initial	Social Security Number
Address *(street, city, state, zip)*			Percent of Death Benefit

Distribution Codes for 1099R:

- ☐ Death (4)
- ☐ Direct rollover from Qualified Plan to IRA (4G)
- ☐ Direct rollover to another Qualified Plan (H)

If participant was subject to **minimum distribution requirements**, specify RMD amount for year if not taken : $_______________ (7)

Choose appropriate withholding election: ☐ 20% ☐ 10% ☐ None

Make check(s) payable as follows: (check one or both as applicable)

☐ Amount payable to Beneficiary: $ __________________ or __________% of distribution
☐ Amount payable as Rollover: $ __________________ or __________% of distribution

Rollover Payable to: ____

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Address *(street, city, state, zip)*			Percent of Death Benefit

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If participant was subject to **minimum distribution requirements**, specify RMD amount for year if not taken : $_______________ (7)

Choose appropriate withholding election: ☐ 20% ☐ 10% ☐ None

Make check(s) payable as follows: (check one or both as applicable)

☐ Amount payable to Beneficiary: $ __________________ or __________% of distribution
☐ Amount payable as Rollover: $ __________________ or __________% of distribution

Rollover Payable to: ____

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Section 5 – Review Form and Submit to MetLife

Once the form has been reviewed, the form may be submitted to MetLife for processing via RetireLink. Please refer to the TPA Guide or contact your Account Executive for instructions.