

Archdiocese of Washington



Pension Data Change Request - INSTRUCTIONS

Please use the Pension Data Change Request Form to process any changes to the employee pension data on file in the Office of Human Resources.

The data on file is provided by the employing location and thus, any changes to the data must be requested by the employing location. Requested changes will also require the submission of applicable documentation to verify the requested change. To assist us in locating the record it is very important that you enter the information on the top section of the form (Name, Date of Birth, and SSN) as it currently appears on the employee's Pension statement.

In order to process the requested change you will need to provide the necessary back up documentation. Examples of acceptable evidence are listed below but it is not inclusive of all acceptable forms. Although there may be multiple acceptable forms of supporting documentation you need only submit **one** item for each type of change.

Type of Change	Evidence Required (copy only)
Name	<ul style="list-style-type: none"> • Social Security Card • Legal Name Change Documents
Date of Birth	<ul style="list-style-type: none"> • Birth Certificate • Driver License • State Issued ID • Passport
Date of Hire	<ul style="list-style-type: none"> • Appointment/Offer letter • W-2 from calendar year of hire • Payroll Register Report from calendar year of hire
Social Security Number	<ul style="list-style-type: none"> • Social Security Card
Earnings	<ul style="list-style-type: none"> • W-2 • Payroll Register Report
Termination Date	<ul style="list-style-type: none"> • None Needed
Plan Entry Date <i>Plan entry is the 1st of the month following 1 year of benefit eligible employment. If adjusting hire date plan entry date would usually automatically adjust Plan Entry Date</i>	<ul style="list-style-type: none"> • If also changing Date of Hire, Plan Entry Date will automatically adjust to 1st of month following 1 year of eligible employment. No additional documentation will be needed. • If original Date of Hire is not changing or Plan Entry date is not the 1st of the month following Date of Hire: Appointment/Offer Letter as evidence of changed benefit eligible employment status.

This form will most commonly be used following the employee's receipt of their annual estimated pension statement. However, changes can be submitted at any time. Changes will take approximately 45 days to process upon receipt of a completed form and all necessary documentation.

In the event the requested change results in a debit or credit to your account you will be billed or credited accordingly.

Completed forms with requisite documentation can be sent via email, fax, or USPS mail as detailed below.

Should you have any questions on the Employee Pension Plan please contact us at:

- Email: ArchdioceseHR@adw.org Please indicate "pension" in the subject line.
- Phone: 301.853.4513 option 1 or 301.853.4500 when calling please reference that you have questions about pension to ensure that you are transferred to the appropriate HR staff member.
- Fax: 301.853.7680.