

Application for Service Pension Instructions

The Application for Service Pension, Form SN-302, is the official notice to the company that you are retiring. This form begins the process for your retirement benefits based on the information you provide.

To be eligible for a service pension, you must meet one of the following criteria:

Non-management

- You are at least 50 years old with a minimum of 25 years seniority; or
- You are at least 55 years old with a minimum of 20 years seniority; or
- You are at least 65 years old with a minimum of 10 years seniority; or
- You are any age with 30 years seniority.

Management

- You have a minimum of 10 years net credited service and your net credited service and your age (both in whole years and whole months) equals or exceeds 75 years.

It is important that you give sufficient notice to your supervisor that you plan to retire. When determining your last official day on the payroll, consider any vacation days that you will take before retirement (if applicable), as well as optional holidays, etc.

You should apply for retirement benefits about three months before your planned retirement date by completing this application. You (the applicant) and your immediate supervisor must sign the form. Without these signatures, your pension payment may be delayed. Once this form is signed, you or your immediate supervisor must send it to the BellSouth Pension Administrator for processing. The address is printed at the bottom of the form.

When you send in your Form SN-302, the BellSouth Pension Administrator will mail your personal retirement information. If you submit the form more than three months prior to your retirement date, you will not receive your information until approximately 90 days before you retire. Because a mandatory pension "election period" provides a minimum of 30 days in which you must decide how you want your pension paid, you must return this form at least 30 days before your pension payments can begin.

For your convenience, instructions for completing the SN-302 are attached.

Application for Service Pension Instructions

#	Item Heading	Instructions
	Please Check One (located at the top right corner of the form)	Check to indicate whether this is your Original Application, Revised Application or to Cancel Previous Application.
<i>To Be Completed And Signed By Applicant</i>		
		Enter all of the information that is requested regarding the name of the BellSouth company from which you are retiring, the city and state, your job title, etc. Your application cannot be processed without this information.
	Personal Information	Enter all personal information that is requested. Your application cannot be processed if this information is not entered on the form. Be sure to print your name as it appears on your paycheck.
	Retirement Information	Enter all retirement information that is requested. The Pension Administrator cannot process your application if this information is not completed.
1	Last Day Active Payroll (Month, Day, Year)	Enter the month, day and year of your last day on active payroll.
2	Date Retirement Begins (Month, Day, Year)	Enter the month, day and year that your retirement begins. This should be the day after your last day on active payroll.
3	Pension Commencement Date (Month, Day, Year)	Enter the month, day and year you want your pension payments to begin. This date can be as early as the day after your last day on active payroll, but it can't be later than your 65th birthday. If you are taking your pension immediately, the Date Retirement Begins and the Pension Commencement Date will be the same.
4	Net Credited Service (NCS) / Seniority Date (Month, Day, Year)	Enter your net credited service (NCS) or seniority date.
5	Birthday (Month, Day, Year)	Enter your birthday with the month, day and year.
6	Age At Retirement	Enter the age that you will be when you retire.
7	Marital Status	Check the box that indicates your marital status.
8	Applicant's Signature	Sign your application. Your application cannot be processed without your signature.
9	Date (Month, Day, Year)	Enter the month, day and year that you sign your application.
<i>To Be Completed And Signed By Supervisor</i>		
	Company Information	Your supervisor or manager must review the form, complete this section and sign the application. It is important for your supervisor to send a copy of the form to the appropriate directors to alert them that you are retiring. You or your supervisor can fax, mail or overnight the application to the BellSouth Pension Administrator as indicated on the form. At this time, your supervisor should be fully aware of your intentions to retire.



Application for Service Pension

To be service pension eligible, you must meet one of the following criteria:

Non-Management

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- You are at least 55 years old with a minimum of 20 years seniority; or
- You are at least 65 years old with a minimum of 10 years seniority; or
- You are any age with 30 years seniority.

Management

- You have a minimum of 10 years net credited service and your net credited service and your age (both in whole years and whole months) equals or exceeds 75 years.

Please Check One:

Original Application

Revised Application

Cancel Previous Application

To Be Completed And Signed By Applicant

1) Company		2) City and State Retiring From	
3) Job Title	4) Wage Scale/Job Grade	5) Check One <input type="checkbox"/> Non-Management <input type="checkbox"/> Management	

Personal Information

1) Name (First, Middle, Last)		2) Social Security Number		3) Responsibility Code	
4) Home Address (Street No.)		5) City	6) State	7) Zip	8) Home (Area Code) Telephone No.
9) Mailing Address (Street No. or P.O. Box)		10) City	11) State	12) Zip	
13) Work Address (Street No.)		14) City	15) State	16) Zip	17) Work (Area Code) Telephone No.

Retirement Information

1) Last Day Active Payroll (Month, Day, Year)		2) Date Retirement Begins (Month, Day, Year)		(This is normally the day after your last day on active payroll. Please note that employees will not be paid for optional holidays not taken, excused work days not taken and in the case of management employees, unused vacation.)	
3) Pension Commencement Date (Month, Day, Year)			4) Net Credited Service (NCS) /Seniority Date (Month, Day, Year)		
5) Birthday (Month, Day, Year)			6) Age At Retirement		
7) Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Never Married					
8) Applicant's Signature				9) Date (Month, Day, Year)	

To Be Completed And Signed By Supervisor

Employee's supervisor or manager must review this form, complete the following and sign below. It is important that the supervisor sends a copy of this form to the appropriate directors to alert them that the employee's status is changing.

Company Information

1) Will the employee be taking a transitional leave? <input type="checkbox"/> Yes <input type="checkbox"/> No		2) Is the employee in a formal surplus group/universe? <input type="checkbox"/> Yes <input type="checkbox"/> No			
3) Immediate Supervisor's Signature		4) Immediate Supervisor's Name (Please Print)		5) Date (Month, Day, Year)	
6) Work Address (Street No.)		7) City	8) State	9) Zip	10) Work (Area Code) Telephone No.

Please return this form to:

FAX: (847) 948-0366 (If you fax, please retain the original in your files)

MAIL: BellSouth Pension Administrator
P.O. Box 990
Deerfield, IL 60015-9685

OVERNIGHT: BellSouth Pension Administrator
1417 Lake Cook Road
Deerfield, IL 60015