|  |  |  |  |
| --- | --- | --- | --- |
| **Participant’s Name** | JOSEPH SMOE | **MPID** | M12345678 |
| **Counselor’s Name** | JOHN JONES | **Counseling Date** | 07/01/2011 |
| **Retirement Type** | EARLY UNREDUCED RETIREMENT | **Retirement Date** | 09/01/2011 |

**Participant Demographic Information**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Marital Status** | | | | | MARRIED | **SSN** | 123-45-6789 | | | | | **DOB** | | 09/25/1949 |
| **Address** | | | 123 MAIN STREET | | | | | | | | | | | |
| **City** | BURBANK | | | | | | **State** | | CA | | **Zip Code** | | 91505 | |
| **Home Phone** | | | | (818) 555-1234 | | | | **Work Phone** | | (818) 555-3456 | | | | |
| **Cell Phone** | | | | (818) 555-9876 | | | | **Fax** | |  | | | | |
| **Email** | | JSMOE@EMAIL.COM | | | | | | | | | | | | |

|  |  |
| --- | --- |
| **Divorces/QDROs/Joinders on File:** | QDRO – JANICE SMOE 01/01/1993  DIVORCE – JUNE SMOE 06/15/1981 |

**History of Participation**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Qualified Years** | 30 | **Credited Hours** | 60,001 | **Retiree Health Eligible?** | Yes No |

|  |  |
| --- | --- |
| **Breaks in Service:** | 1986-1989: BRIDGED – DISABILITY  1992-1995: NOT BRIDGED |
| **Forfeitures:** | NONE |
| **Other History:** | NONE |

**Retirement Documents Received**

* Retirement Application
* Proof of age (i.e. birth certificate or passport)
* Copy of Participant’s Social Security card
* Copy of Participant’s spouse’s Social Security card

**Retirement Documents Pending**

* Copy of Participant’s marriage certificate
* Conformed copy of Participant’s final judgment of divorce from Participant’s prior spouse

**Enclosures:**

* Beneficiary Forms
* Participant’s Retirement Benefits Estimate Summary
* All required Pension, IAP and Retiree Health forms