February 27, 2025

{stdMbrFullName}

{x stdMbrAdrCorStreet1}

{x stdMbrAdrCorStreet2}

{x if stdIsUSA = 1}

{x stdDomesticStateInternationalCountry}

{x else}

{x stdDomesticStateInternationalCountry}

{x stdMbrAdrCountryDesc}

{x endif}

**Re: Refund of Non-Vested Employee Contributions and/or Unclaimed Vacation & Holiday Pay Plus Interest**

Dear {stdMbrFullNameInProperCase}:

Our records indicate that you do not have a vested benefit in the Motion Picture Industry Pension Plan.

However Pension records show that you have an interest through Employee Contributions and /or Unclaimed Vacation and Holiday Pay (UVHP). Employee Contributions and UVHP cannot be forfeited. These benefits are available for you to withdraw. If you do not withdraw your balance, it will continue to accrue interest.

{x if strEE = Y}

Our records indicate that you have {EEAmount} of Employee Contributions plus accrued interest of {TotIntsAmount}, totaling {TotEEUVHPnInt} in the Pension Plan. If your taxable balance is equal to or greater than $200, it is subject to a mandatory 20% federal tax withholding, unless you roll it over into a qualified IRA. You must complete the Lump Sum Distribution Election form to process your payment as a rollover.

{x endif}

{x if strUVHP = Y}

Our records indicate that you have {UVHPAmount} of UV&HP plus accrued interest of {TotIntsAmount}, totaling {TotEEUVHPnInt} in the Pension Plan. {if TotIntAmt >= 200.00} If your taxable balance is equal to or greater than $200, it is subject to a mandatory 20% federal tax withholding, unless you roll it over into a qualified IRA. You must complete the Lump Sum Distribution Election form to process your payment as a rollover.

{endif}

{x endif}

{x if strBoth = Y}

Our records indicate that you have {EEAmount} of Employee Contributions and {UVHPAmount} of UV&HP plus accrued interest of {TotIntsAmount}, totaling {TotEEUVHPnInt} in the Pension Plan. {if TotIntAmt >= 200.00} If your taxable balance is equal to or greater than $200, it is subject to a mandatory 20% federal tax withholding, unless you roll it over into a qualified IRA. You must complete the Lump Sum Distribution Election form to process your payment as a rollover.

{endif}

{x endif}

**Documents Required**

* Proof of age: You must submit legal evidence of your date of birth prior to the receipt of any benefit payments. You may provide a clear photocopy of your birth certificate, passport, Real ID, military discharge papers, residency card or naturalization certificate.
* Verification of Tax ID for yourself and your beneficiary(ies): You must submit proof of a Social Security Number (SSN) or Tax ID Number (TIN) for yourself and each beneficiary. You may provide a clear photocopy of a Social Security card.

If you are currently a Break in Service\* Participant, you will receive payment within 60 days after the Plans receive the completed forms. If you are not a Break in Service Participant who is leaving the Motion Picture Industry (the ”Industry”), you must not be employed within the Industry at any time during the three months following receipt of your forms. Provided this condition is met, you will receive payment within 60 days after the three-month period is over.

***Please refer to the enclosed IRS Notice - Special Tax Notice Regarding Plan Payments (Pink) - for more detailed rules regarding your distribution.***

Please note, this request may be canceled if the Plans do not receive the attached form(s) by the prescribed due date as indicated on the Refund Application - Employee Contributions and UV&HP form.

If you have any questions, please contact MPI’s Participant Services Center by email at rsd@mpiphp.org or by telephone at (855) ASK-4MPI between 8 a.m. and 5 p.m. Pacific Time, Monday through Friday.

Sincerely,

Retirement Benefits

**IMPORTANT NOTE: MPI will send you a 1099R Tax form in January following your payment. It is imperative that you inform the Plans of your new mailing address, should it change after your payment is received.**

See your Summary Plan Description for additional information about the Plans. Benefits are subject to final verification, review and adjustment. If applicable, these amounts may be subject to change in accordance with any divorce or Qualified Domestic Relations Order (QDRO), which may or may not be on file. In the event of any inconsistency between any communications and the provisions of the Plans, the provisions of the Plans shall govern.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PARTICIPANT:** | {stdMbrFullNameInProperCase} | **BIRTH DATE:** | {stdMbrDateOfBirth} | |
| **SPOUSE:** | {stdMbrSpouseFullName} | **BIRTH DATE:** | {stdSpouseDateOfBirth} | |
| **REFUND TYPE:** | Employee Contributions (including UV&HP) plus interest | | |  |

To the Board of Directors of the Motion Picture Industry Pension Plan (“Pension Plan”) and the Motion Picture Industry Individual Account Plan (“IAP”) (collectively “the Plans”):

This is to notify you that I, {stdMbrFullNameInProperCase}, hereby voluntarily request a refund of my Employee Contributions including Unclaimed Vacation and Holiday Pay (“UV&HP”), plus interest, from the Pension Plan as of **{strRefundDate}**, in accordance with Article V, Section 2 of the Pension Plan.

**PLEASE READ CAREFULLY BEFORE SIGNING**

**I understand that:**

1. I am voluntarily electing to receive a refund. The Pension Plan does not require me to receive a refund.
2. The amount of my refund is the amount of my Employee Contributions (including UV&HP, if any) on record with the Pension Plan, plus interest, and may only be available to me if I am not vested in the Pension Plan.
3. If the benefit is over $7,000 when payment is due, benefits will be paid as an annuity unless I (and my spouse, if married) elect otherwise on a benefit election form.
4. Before any payment(s) can be made, I must provide proof of my date of birth and, if married, my spouse’s date of birth and marriage certificate to the Plans for verification. In addition, I must provide a conformed copy of any final divorce decrees (with the property settlement and agreement) for any previous spouse(s) during my participation in MPI to determine if my prior spouse(s) has a claim on my pension benefit.
5. If I am on a Break in Service\*, I will receive payment within approximately sixty days after the delivery of this application and all required documentation to the Plans.
6. If I am not on a Break in Service, I will be eligible to receive my refund when I do not work in (or receive any consideration from) the Industry (whether or not my employer contributes to the Pension Plan and the IAP Plans), for three complete calendar months following submission of this application and all required documentation to the Plans. I will receive payment within approximately sixty days after completion of the three-month no-work requirement.
7. I cannot buy back benefits if they are already forfeited due to a Break in Service. Even if I repay such Contributions, my earlier credited hours will be ignored for purposes of calculating the amount of any Disability Pension (if eligible), unless I earn two qualified years after I repay my contributions.
8. I cannot repay the amount I received from UV&HP once I withdraw.
9. I understand that the refund payable is subject to final review and possible adjustment.

**PARTICIPANT’S CONSENT**

I understand that this application and all required forms and legal documents must be received by the Plans on or before {CurrentDatePlus60days} or this refund application will become invalid.

Under penalty of perjury, I certify that my current marital status is: Single Married Divorced Widowed

Participant’s Signature Date