

CARES Act Hardship Withdrawal Request

Online Form Instructions

Requesting a CARES Act Hardship withdrawal online is a simple process which eliminates the chance of errors associated with paper forms, and ensures your request arrives at The Pension Boards quickly and safely.


Below you will find step-bystep instructions which will guide you through completion of your request. Please note – use of the online form requires you to complete the form on your computer or tablet. You may not complete the form using your phone.


Once you have completed the form, an electronic version will be emailed to you for your records. The form will also be electronically transferred to The Pension Boards for processing. Please allow up to 7 business days for processing.

If spousal consent is required, complete the first two parts of the form. You may then either print the form and take it to a Notary Public for signature, or you may use the online electronic Notary function. If selecting the online Notary an actual licensed Notary will contact you through the form filler application.

If you have selected the option to use electronic notary, please have proof of ID such as a valid driver's license or government issued ID or Passport handy. Your spouse must be present with you during this step and must also have valid identification. Detailed instructions will be provided by the notary assigned to your case.

This is what you will see on the right side of your screen after clicking on the form link. This is an image of the form you will be filling out.





The Pension Boards—United Church of Christ, Inc.

CARES Act Hardship Withdrawal Application

PERSONAL INFORMATION		
Name (last, first, middle initial)	Title	Office Use Only
Address (number and street)	Phone (incl area code)	
City/Town	Email	
State/ZIP	Member Number	
Amount of Withdrawal \$	Last 4 digits of SSN	

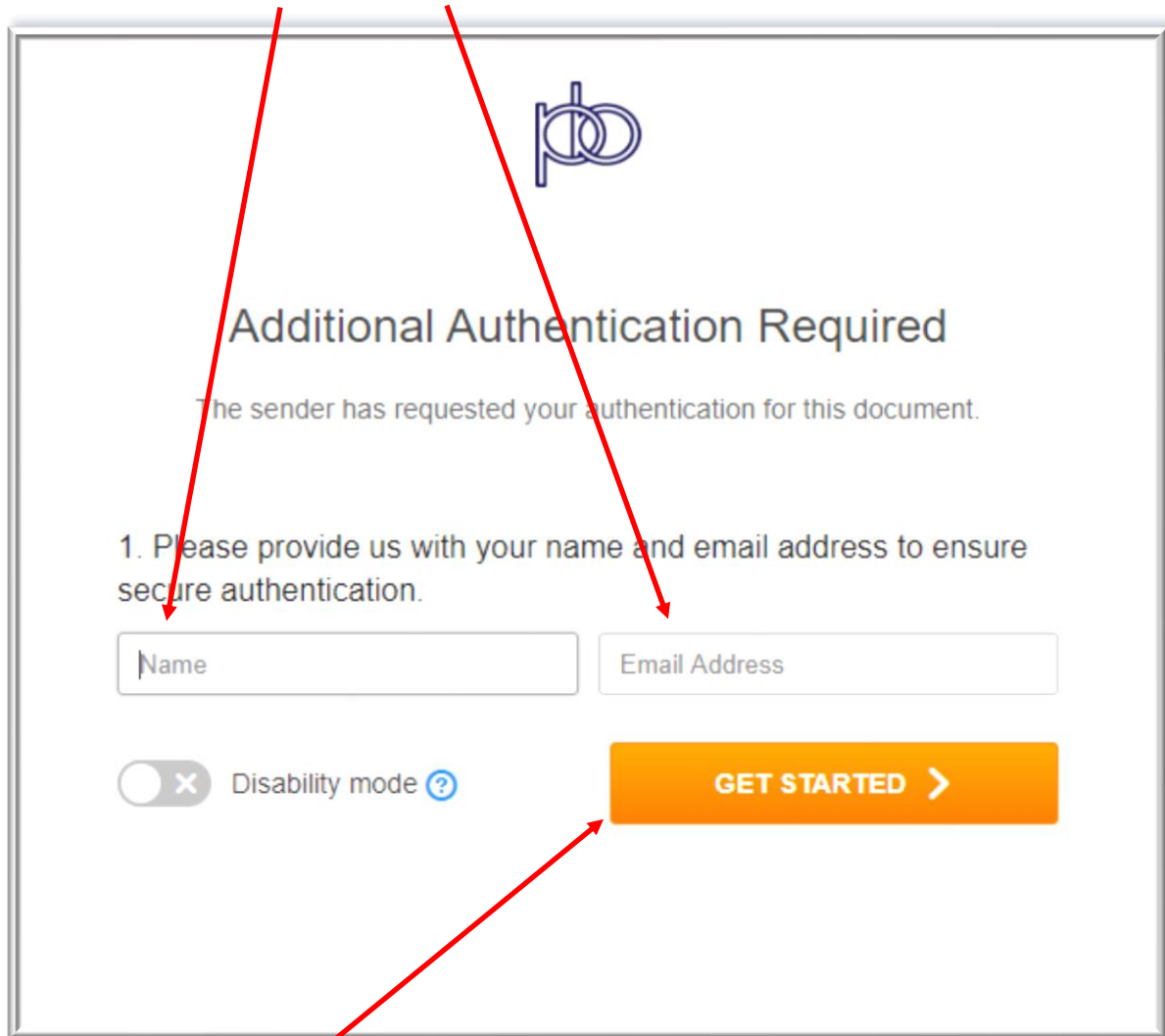
DISTRIBUTION METHOD	
Select Electronic Funds Transfer (1) or Mail Check (2)	
1) Electronic Funds Transfer (EFT) <input type="checkbox"/> Checking <input type="checkbox"/> Savings	
Please complete for EFT	
Bank Routing Number <small>(Nine digits, starts with 0, 1, 2, 3, or 4)</small>	Bank Name
Checking or Savings Account Number	Checking or Savings Account Owner Name
2) Mail Check <input type="checkbox"/>	

CONSENT OF SPOUSE AND NOTARY CERTIFICATION <small>(Required if the member is married)</small>	
<input type="checkbox"/> I hereby consent to the election by my spouse. I understand that no annuity benefits will be payable to me on TSA distributions not replaced by the member/spouse pursuant to Section 4.15 of the Annuity Plan of The United Church of Christ, Inc.	
Spouse's name (please print)	Date
Spouse's signature	
Signature and stamp of Notary Public	
	Date


CERTIFY SIGN AND DATE	
I hereby certify that I qualify for a "coronavirus-related distribution" and the requested distribution is within the limits and requirements pursuant to Section 4.15 of the Annuity Plan of The United Church of Christ, Inc.	
Member's signature	Date

This is what you will see on the left side of your screen.

Please enter your name and email address



The screenshot shows a dialog box titled "Additional Authentication Required" with a logo in the top right corner. Below the title, it says "The sender has requested your authentication for this document." A numbered instruction "1. Please provide us with your name and email address to ensure secure authentication." is followed by two input fields: "Name" and "Email Address". At the bottom left, there is a "Disability mode" toggle switch and a help icon. At the bottom right is a large orange "GET STARTED" button with a right-pointing arrow. Three red arrows are overlaid on the image: one points from the top left to the "Name" input field, another points from the top center to the "Email Address" input field, and a third points from the bottom left to the "GET STARTED" button.



Additional Authentication Required

The sender has requested your authentication for this document.


1. Please provide us with your name and email address to ensure secure authentication.

☐ Disability mode [?](#)

GET STARTED >

Then click "GET STARTED"

You are now presented with a disclosure statement necessary to sign your form electronically.



Electronic Record and Signature Disclosure

Agreement to do business with **The Pension Boards UCC**

Electronic Record and Signature Disclosure

From time to time, **The Pension Boards UCC** (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the airSlate, Inc. (airSlate) electronic signing system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the "Send and Start" button below.

- **All notices and disclosures will be sent to you electronically**

We will be providing you via electronic mail to the your email address of all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you.
- **Valid and current email address, notification and updates**

Your current valid email address is required in order for you to continue to use airSlate signing system and receive notices and disclosures as required by law. After you complete this document, you will be prompted to enter your email address. You must enter your email address. You agree to keep **The Pension Boards UCC** and airSlate informed of any changes in your email address. To advise **The Pension Boards UCC** of a change in your e-mail address, please send an email to tnolan@pbucc.org.

To let airSlate know of a change in your e-mail address, you must contact airSlate support team by email via support@airslate.com. It is your responsibility to check your email for Electronic Communications and to check for updates to this Agreement.

[Send Disclosure over the email](#)

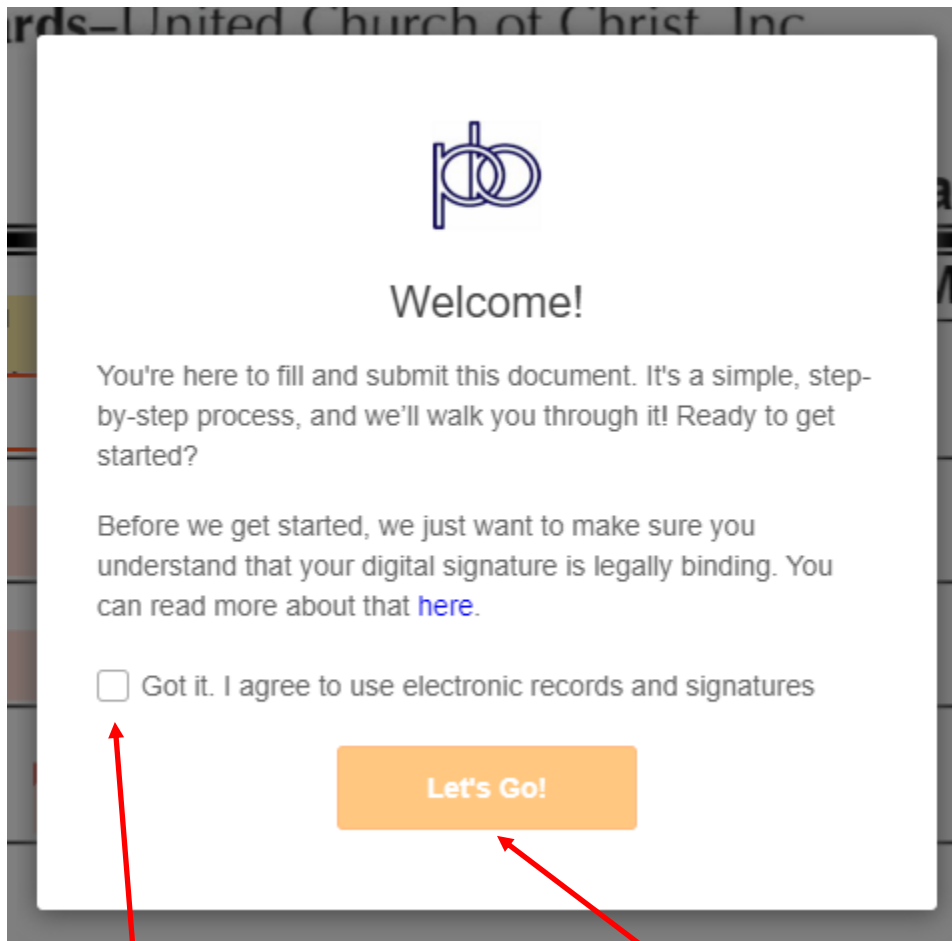
Start

You can elect to have a copy of the disclosure sent to you by email

Or

Simply click "START"

When you click "START" you are presented with the following screen



The screenshot shows a white rectangular box centered on a dark background. At the top of the box is a logo consisting of two interlocking circles with a vertical line through the center. Below the logo, the word "Welcome!" is written in a bold, black, sans-serif font. Underneath, there is a paragraph of text: "You're here to fill and submit this document. It's a simple, step-by-step process, and we'll walk you through it! Ready to get started?". This is followed by another paragraph: "Before we get started, we just want to make sure you understand that your digital signature is legally binding. You can read more about that [here](#)." Below this text is a checkbox followed by the text "Got it. I agree to use electronic records and signatures". To the right of the checkbox is an orange rectangular button with the text "Let's Go!" in white. Two red arrows originate from the bottom of the image: one points to the checkbox and the other points to the "Let's Go!" button.

Logo: A stylized 'p' and 'o' intertwined.

Welcome!

You're here to fill and submit this document. It's a simple, step-by-step process, and we'll walk you through it! Ready to get started?

Before we get started, we just want to make sure you understand that your digital signature is legally binding. You can read more about that [here](#).

☐ Got it. I agree to use electronic records and signatures

Let's Go!

Check the box if you wish to sign the form electronically and then click "Let's Go!"

Clicking “Let’s Go” opens the actual electronic form

The screenshot shows the 'CARES Act Hardship Withdrawal Application' form for The Pension Boards—United Church of Christ, Inc. A green 'Start' button is on the left. A blue information box in the top right corner contains the following text:

Please be sure that all information in this document is correct before submitting. If you have any questions about using PDFfiller, please click the question mark.

The Pension Boards UCC
The Pension Boards UCC
trotan@pbucc.org
P: 1-800-642-6543
www.pbucc.org

The form is divided into two main sections: 'PERSONAL INFORMATION' and 'DISTRIBUTION METHOD'. The 'PERSONAL INFORMATION' section contains several peach-colored input fields, each with a red arrow pointing to it, indicating they are required. These fields are: 'Enter your Last Name, First Name and Middle Initial (Required)', 'Address (number and street)', 'City/Town', 'State/ZIP', 'Amount of Withdrawal \$', 'Title', 'Phone (incl area code)', 'Email', 'Member Number', and 'Last 4 digits of SSN'. The 'DISTRIBUTION METHOD' section has a heading 'Select Electronic Funds Transfer (1) or Mail Check (2)' and two radio button options: '1) Electronic Funds Transfer (EFT)' and 'Checking', with a 'Savings' option also present.

All Peach colored fields are required !

At the top of each field you will see helpful tips telling you how to complete each field.

Simply start entering your information. At the end of each field simply hit “enter” or “return”

The system will automatically move you to the next field.

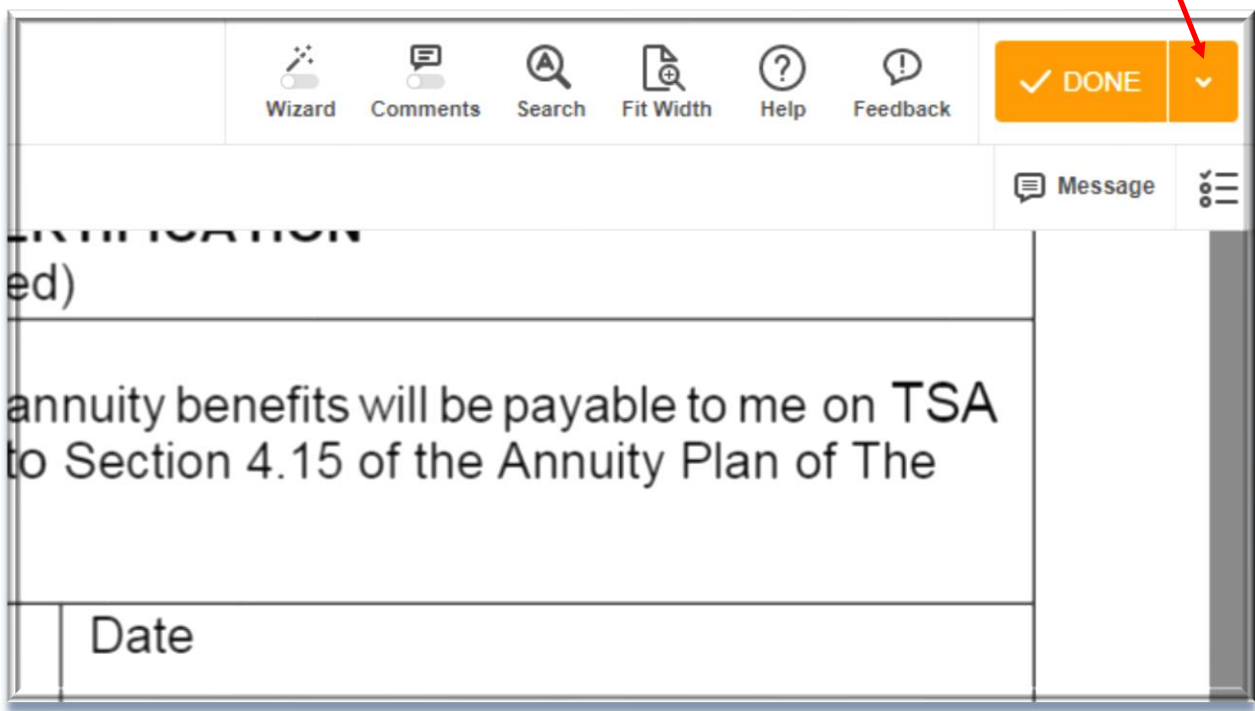
Please enter the information exactly as described. For example, when entering your phone number only enter the digits. When you enter your member ID enter only the digits and so on for each field.

When you reach the point of selecting the distribution method the system will move you through the fields based on your selection.

Once you are done entering your information you will be able to electronically sign the document and it will be sent to The Pension Boards for processing. You will also receive a copy of the completed form at the email address you provided.

If you need spousal consent you have the option to print and take it to a notary or use the electronic notary option which is enabled by selecting the down arrow shown.

Before you click the down arrow or “Done” if you do not need spousal consent please review your entries to be sure the information is complete and accurate



The screenshot shows a document review interface. At the top, there is a toolbar with icons for Wizard, Comments, Search, Fit Width, Help, and Feedback. To the right of these icons are two orange buttons: one with a checkmark and the text "DONE", and another with a downward-pointing arrow. A red arrow points from the text in the paragraph above to this second button. Below the toolbar, there is a "Message" button and a menu icon. The main area of the form contains text that is partially obscured, but visible text includes "ed)", "annuity benefits will be payable to me on TSA", and "to Section 4.15 of the Annuity Plan of The". At the bottom left, there is a field labeled "Date".

IMPORTANT! If you need spousal consent and have selected the option to use electronic notary a live licensed notary will connect with you via the form fill system. Please have proof of ID such as a valid driver license or government issued ID or Passport handy.