

## **DATA REQUIREMENTS FOR INSTALLATION**

For the John Hancock to maintain records and calculate and pay benefits to your participants, we will require the following information:

- 1. Name (First and Last)**
- 2. Social Security Number**
- 3. Date of birth**
- 4. Sex**
- 5. Current mailing address**
- 6. Date of employment**
- 7. Date of termination**
- 8. Actual retirement date**
- 9. Form of Annuity**
- 10. Contingent Annuitant information**
  - **Name**
  - **Social Security Number**
  - **Date of birth**
  - **Sex**
  - **Relationship to payee**
- 11. Beneficiary name and relationship**
- 12. Deductions - Federal and State withholding**
- 13. Customized deductions (medical, dental, life premiums, etc.)**
- 14. Participant Bank information (if applicable)**
  - **Bank address**
  - **Account number**
  - **Bank routing number (ABA)**

Items 1 through 7 are necessary for both deferred and retired participants.

Items 8 through 14 are necessary only for retired participants.

In addition, we will require a listing of participants and payees who have a Qualified Domestic Relations Order or other court order or attachment against their pension since these situations require special handling.