



***SECURITY BENEFIT FUND***  
**APPLICATION FOR FINANCIAL ASSISTANCE**

- All information on this application must be completed.
- You must complete a new application for each month you apply for this benefit.
- The following documentation must accompany this application:
  1. A copy of unemployment, disability or workers' compensation check for any week-ending in the month that you are applying for financial assistance, if one has not yet submitted for the Replacement Wages benefit.
  - AND
  2. A copy of your invoice for mortgage, taxes, rent and/or maintenance fees.
- This benefit is subject to all Federal, State, City and FICA taxes and will be reported on Form W-2 at year end.
- If you wish to adjust your tax withholding, please complete forms W-4 (Employee's Withholding Certificate) and IT-2104 (New York State Employee's Withholding Certificate). Once the tax forms are received, we will use your withholding elections for all taxable disbursements from the Security Benefit Fund.

Book Number \_\_\_\_\_

Name \_\_\_\_\_

\_\_\_\_\_ Home Telephone

\_\_\_\_\_ Mobile

\_\_\_\_\_ E-mail

Type of benefit requested (Check One)

- |   |   |
|---|---|
| <input type="checkbox"/> Mortgage Payment | <input type="checkbox"/> Property Taxes   |
| <input type="checkbox"/> Rent             | <input type="checkbox"/> Maintenance Fees |

Benefit is for the month and year of \_\_\_\_\_ (month) \_\_\_\_\_ (year)

**SIGNATURE** \_\_\_\_\_

**DATE** \_\_\_\_\_



## FINANCIAL ASSISTANCE BENEFIT

For any part of a month in which you are unable to work as a steamfitter, the Fund will reimburse you in an amount not to exceed your account balance for your unpaid mortgage, co-op mortgage and maintenance fees, condominium mortgage and maintenance fees, rent or property taxes on your primary residence for that same month.

The Fund will require a copy of an Unemployment, Disability or Workers Compensation check for a week ending in that month in order to reimburse you for that month. For example, if your check is for the period of July 26<sup>th</sup> through August 1<sup>st</sup> (thus, the week ending period check is August 1<sup>st</sup>) reimbursement for financial assistance would be for the month of August even if most of the period was in July. [An Affidavit For Replacement Wages is not acceptable for this benefit.]

If you have exhausted or are ineligible for Unemployment Benefits, the Fund will require a letter from the appropriate state agency verifying your ineligibility for unemployment benefits.

Documentation supporting your financial assistance request such as an unpaid mortgage invoice, co-op fee statement, property tax bill, or rent invoice must be in the member or spouse's name ONLY. A letter from the landlord verifying rent due (for each month you apply for) when there is no written lease in effect is sufficient.