

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 phone

Mobile

E-mail

Type of benefit requested (Check One)

☐

Mortgage Payment

☐

Property Taxes

☐

Rent

☐

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 26th through August 1st (thus, the week ending period check is August 1st) 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.