

SECURITY BENEFIT FUND
APPLICATION FOR LEGAL SERVICES BENEFIT

- The Legal Services Benefit is a reimbursement for participants who have incurred legal expenses for themselves or their legal dependents.
- Covered legal services include: real estate transactions involving the purchase, refinancing, or sale of a primary residence; wills, trusts, health care proxies, and powers of attorney; estate administration; adoption proceedings; divorce proceedings, including separation agreements, Qualified Domestic Relations Orders; Veteran's Administration, or immigration issues; bankruptcy; debt collection, including garnishment or attachment; moving traffic violations; and initial consultations for civil matters.
- This benefit is subject to important limitations. No reimbursement will be provided for legal services related to criminal investigations or indictments, or for litigation against Enterprise Association Local 638 or any related employee benefit fund. Additionally, the benefit applies only to legal services provided to the participant or the participant's eligible dependents in their individual capacity and may not be used for legal expenses arising from any business venture owned, operated, or pursued by the participant or their dependents.
- Please complete this application and include an itemized invoice that includes the attorney or law firm name, address and contact information, date(s) of service, description of legal services performed, and total amount charged.
- You are responsible for paying the legal fees on order to be reimbursed from the Fund. Proof of your payment (cancelled check, credit card statement, etc.) must be included.
- 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 updated withholding elections for all taxable disbursements from the Security Benefit Fund.
- This benefit is subject to all Federal, State, City and FICA taxes and will be reported on Form W-2 at year end.

Book Number _____

Name _____

Home phone _____

Mobile _____

E-mail _____

Amount Requested _____ (Not to exceed account balance)

SIGNATURE _____ **DATE** _____