Print Form

Oklahoma Firefighters Pension and Retirement System

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www.okfirepen.state.ok.us

DEATH BENEFIT TAX FORM

(Beneficiary other than spouse, i.e. funeral home)

The death benefit exclusion under Internal Revenue Code 101 (b) has been repealed for payments with respect to individuals dying after August 20, 1996. The benefit is now taxable income to the beneficiary.

If the death benefit is paid to an individual(s) other than the participant's spouse, ten percent (10%) withholding is to be withheld. However, the beneficiary(ies) can elect to not have taxes withheld at the time of distribution. At year end, the beneficiary(ies) would offset their taxes by any amount already paid (via the optional 10% withholding). Please indicate your choice below. **(Check One)**

☐ Ten percent (10%) federal tax to be withheld

☐ No tax to be withheld at time of disbursement

_____
Deceased member's SSN

_____
Applicant's SSN
(If applicant is Guardian of minor child, use child's SSN)

_____
Tax ID for Estate or Trust (If applicable)

_____
Applicant's Signature (OR funeral home representative)

_____
Mailing Address

_____ _____ _____
City State Zip Code

_____
Phone Number