

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.
- 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
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Amount Requested _____ (Not to exceed account balance)

SIGNATURE _____	DATE _____
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