

Report of death of MTRS benefit recipient

INSTRUCTIONS

Please submit **your completed form** to the MTRS in one of three ways:

- 1) **FAX** to 617-679-6842 (be sure to also fax a photocopy of death certificate); or
- 2) **MAIL** to MTRS Retiree Services, 500 Rutherford Ave., Suite 210, Charlestown, MA 02129 (be sure to mail a photocopy of death certificate); or,
- 3) **E-MAIL** to RetServUnit@trb.state.ma.us (see instructions below).

Within seven days after we receive your form, we will contact you to let you know what the next steps are in the processing of the benefit recipient's MTRS account.

DECEASED BENEFIT RECIPIENT

Name

Date of death

Person's MTRS status. . . . **Retiree** Option retired under (*if known*) A B C
Check all that apply

Survivor (either of a retiree, or of a member who died while in service)

Alternate payee (pursuant to a Domestic Relations Order)

Last 4 digits of SSN MTRS member number (*if known*)

YOUR INFO

Name

Street address

City State ZIP

Phone E-mail

Your relationship to deceased benefit recipient. Spouse Child Sibling Other

INTAKE INFO

- 1) Is there a surviving spouse? Yes No
- 2) Are there any surviving children? Yes; how many? No
- 3) For the purposes of distributing the benefit recipient's assets, is there **either** an estate that will be probated, **or** a trust? .. Yes (*an EIN will be required**) No
- 4) Optional: Please note any additional information that you think would be helpful to us:

- 5) If submitting via FAX or MAIL, ATTACH photocopy of benefit recipient's death certificate

MTRS INTAKE

By _____

On _____

TO SUBMIT YOUR COMPLETED FORM VIA E-MAIL:

- 1) **CLICK** the green button; this will automatically open your e-mail application and attach this completed form to a message addressed to the MTRS.
- 2) **SEND** your e-mail to us. When your e-mail has been successfully sent, you will receive an automated reply confirming that we have received your submission. Also, please either fax or mail a photocopy of the death certificate to the MTRS.

Click the green button above to attach your completed form to an e-mail message automatically addressed to the MTRS

***What is an EIN and how do I get one?** Although it stands for "Employer Identification Number," an EIN is also a tax identification number for estates. EINs are issued by the Internal Revenue Service (IRS), and obtaining one is fast, free, easy and can be done online. To apply for an EIN, simply go to <https://sa.www4.irs.gov/modiein/individual/index.jsp>, Monday through Friday 7:00 a.m. to 10:00 p.m. Eastern Time.