403(b) Hardship Form

The IRS allows for distributions from a 403(b) account to help cover the cost of certain hardship situations. Proof of the financial hardship is required for approval. Hardship distributions are subject to income taxes unless they consist of Roth contributions. They may also be subject to an early distribution 10% tax. Please complete and return this form, along with any required paperwork from your investment provider to PERA Administrators at **Support@peraadministrators.com** or fax it to **725.485.4857.**

Employer Name: Date:

Employee Name: Social Security Number:

Address:

City: State: Zip Code:

Date of Birth: Email Address Phone:

Agent Name: Agent Email: Agent Phone:

Please indicate which of the following IRS approved hardship reasons you wish to use and provide documentation for the hardship:

- ☐ Medical care expenses for the employee, the employee's spouse, dependents, or beneficiary.
- ☐ Costs directly related to the purchase of an employee's principal residence (excluding mortgage payments).
- ☐ Tuition, related educational fees and room and board expenses for the next 12 months of postsecondary education for the employee or the employee's spouse, children, dependents, or beneficiary.
- ☐ Payments necessary to prevent the eviction of the employee from the employee's principal residence or foreclosure on the mortgage on that residence.
- ☐ Funeral expenses for the employee, the employee's spouse, children, dependents, or beneficiary.
- ☐ Certain expenses to repair damage to the employee's principal residence.

Amount requested: $

Investment provider:

Investment Provider Name: Account Number:

Phone: Fax:

Address:

City State Zip Code

Employee Signature Date