

Local 804 / UPS

Halliday Financial

Pre-Appointment Worksheet

Employee's Name:

Employee's Date of Birth:

Employee's Address:

Employee's Phone Number:

Employee's Email:

Spouse's Name:

Spouse's Date of Birth:

UPS Center or Building Name:

Full time years of service:

Part time years of service:

Have you received a pension estimate from Atlanta?

- If Yes, then:
 - What is the illustrated retirement age?
 - What is the maximum pension value?
- If No, then:
 - Complete the pension estimate letter

What is your current weekly take-home pay?

What is your target retirement date?