



Direct Deposit Authorization Form

Please review the instructions and checklist on page 2 before sending the form to the Fund Office.

Section 1 – Your Personal Information

Your Name (Print): _____ Pension ID: _____

Social Security #: _____ Phone Number: [] _____

Mailing Address: _____

Email Address: _____

Section 2 – Checking or Savings Account Information

The Fund cannot accept an authorization for direct deposit to an estate or trust, a company/corporate account, or a checking or savings account owned by another person or entity. The account must be in the name of the actual pensioner or beneficiary.

Check One: New Direct Deposit Request Change Existing Direct Deposit (Enter New Account Details Below)

Name of Bank/Financial Institution: _____

Account Type: Checking – **A voided check for this account with your name pre-printed on it or a bank statement must be returned with this form.**

Savings – **A savings deposit slip with your name pre-printed on it or bank statement must be included with this form.**

Enter Routing Number: _____

If you chose a checking account, this is the series of 9 numbers (not starting with 5) in the lower left corner of your check.

Enter Account Number: _____

If you chose a checking account, this is the series of numbers located right after the routing number on your check.

Section 3 – Cancel Direct Deposit Authorization

Cancel – Please cancel my Direct Deposit Authorization and resume paper checks effective immediately.

Mail checks to: The mailing address listed above.

Enter New Address: _____

Section 4 – Authorization and Signature

By signing below, I authorize The American Federation of Musicians and Employers' Pension Fund (AFMEPF) and/or its representative to initiate direct deposit (credit) entries. If funds to which I am not entitled are deposited to my account, I authorize AFMEPF and/or its representative to direct the bank to return said funds (debit). I understand that my bank must be a member of the Automated Clearing House (ACH) in order for my net pay to be processed via Electronic Funds Transfer (EFT). I understand I will be notified if there is a problem with my ACH account transaction during pre-notification.

This authorization is to remain in effect until it is changed or canceled by me via the Direct Deposit Authorization form. I understand that I must allow sufficient time as noted in the instructions for the processing of such changes or cancellation.

Your Signature: _____ Date: _____

This form is available on the Fund's website at www.afm-epf.org in the Participants section under Applications and Forms.

Direct Deposit Authorization Instructions

The Fund cannot accept an authorization for direct deposit to:

- an estate or trust, or
- a checking or savings account owned by another person or entity. The account must be in the name of the pensioner or beneficiary receiving benefits.

Your bank must be a member of the Automated Clearing House (ACH) for a direct deposit to be made by Electronic Funds Transfer (EFT).

If you are requesting direct deposit you must include:

- Checking account - a voided check (that has your name pre-printed on the check) or a bank statement with your completed form. A deposit slip cannot be accepted.
- Savings account - a deposit slip or a bank statement confirming your name on the account, and your account and routing numbers.

Bank pre-notification process. This means your routing number and bank account information are validated by the Fund's bank with your bank before direct deposit can begin. *It can take as long as 6 weeks for a direct deposit to take effect.* Retain a copy of the form for your records. The Fund Office will acknowledge receipt of your Direct Deposit Authorization Form shortly after it is received.

Send the completed form to the Fund Office:

By Email: PensionSupport@afmepf.org

BY MAIL: AFMEPF, P.O. Box 2673, New York, NY 10117-0262

BY FAX: 1-212-284-1298

Can we help you? Call us at 1-212-284-1200 and select option 2 for the Pension Department.

Checklist – In each of the sections you are completing have you:

Section 1 – Your Personal Information:

- entered all of the information?

Section 2 – Checking or Savings Account Information:

- checked one of the boxes to indicate whether this is a new request or a change to an existing direct deposit authorization?
- printed the name of your bank or financial institution?
- checked the account type? Please remember to attach a voided check to the form if you are authorizing a direct deposit to your checking account or a deposit slip or statement from your bank for savings accounts.
- entered the routing number and account number?

Section 3 – Cancel Direct Deposit Authorization:

- checked the box to indicate that you are cancelling direct deposit to the account you previously authorized?
- checked one of the boxes authorizing benefits checks to be sent to your mailing address or a different address?

Section 4 Authorization and Signature:

- signed and dated the form?