Spousal consent
Federal law requires that you, the participant, provide notarized spousal consent if you elect a form of payment other than a joint and survivor monthly annuity with your spouse as beneficiary. The consent must be received by August 5, 2020 for your election to be processed. Please have your spouse complete the bottom part of this page carefully. Your spouse must sign the form and have the signature acknowledged by a notary. The notary must also affix his or her notary seal or stamp to be valid.

Please mail your completed Spousal Consent form to:
HP Retirement Service Center at Fidelity
P.O. Box 770003
Cincinnati, OH 45277-0070
If you have any questions, please call 1-866-602-0406 to speak with a customer service representative.

Participant information

Spouse information

Spousal consent
This is a very important decision. You should think carefully about whether you want to sign this agreement. Before signing, be sure that you understand what benefits you may receive and what benefits you will no longer be able to receive.

I, ________________________________, am the spouse of _________________________________.

- I understand that I have the right to have the Plan pay my spouse’s pension benefits in the form of a Qualified Spousal Survivor Annuity and I agree to give up that right. I understand that by signing this agreement, I may receive no money or less money than I would have received under a Qualified Spousal Survivor Annuity after my spouse dies, depending on the payment option or beneficiary that my spouse has chosen. (A “Qualified Spousal Survivor Annuity” means a life annuity for my spouse’s life with a survivor benefit payable to me for my life if I survive my spouse.)
- I irrevocably agree that my spouse can receive pension benefits for his or her benefit in the Plan in a single lump sum, and that no benefits will be paid to me.
- I understand that my spouse cannot choose a form other than a Qualified Spousal Survivor Annuity unless I agree to the change.
- I understand that I do not have to sign this agreement. I am signing this agreement voluntarily.
- I understand that if I do not sign this agreement, then my spouse and I will receive any payments from the Plan in the form of a Qualified Joint and Survivor Annuity (or other Qualified Spousal Survivor Annuity that my spouse elects).

Spouse's signature

Notary public's signature

Subscribed and sworn before me this date

Commission expiration date

(Place notary seal in this box)
Notary resource
Spousal consent for pension plan distribution elections

If you are married and wish to elect a lump sum or any monthly annuity option other than a joint and survivor monthly annuity with your spouse as a beneficiary, your spouse must provide consent by signing a *Spousal Consent Form* and having the signature acknowledged by a notary. You do not need to be present at the signing. Locations for notaries vary from state to state, as do the rules for charging a fee for notary services. The following is information to help you find a notary and learn what fees may apply.

Notary sources
- **Banks and credit unions**: Banks and credit unions typically have notaries on staff. Check with your local bank or credit union to see if it would be able to notarize your spouse’s consent.
- **Government offices**: Depending on the state, town halls, city halls, and county offices can be excellent resources for a notary. Check with your local government offices to determine if a notary is on staff and whether an appointment is necessary.
- **The UPS Store**: These locations are your one-stop shop for notarizing important legal documents. To find a location near you, visit [www.theupsstore.com](http://www.theupsstore.com).
- **Miscellaneous resources**: Accountants, attorneys, mortgage companies, and paralegals are often sources for notary services.

Search online for notary resources in your area as well.

Notary fees
The ability of a notary to charge a fee for service depends on the state where the notary is legally empowered to witness and certify document validity. In some cases, even when notaries can legally charge a fee, they don’t if you are a client (e.g., banks often won’t charge a fee to their customers). Some states permit notaries to charge travel fees if the notary comes to you. Be sure to inquire about all fees that a notary may charge you before you use his or her services.