

Census Data Requirements

Census Data Required with Request for Proposal (must be in electronic format)

- Name
- Identification number
(Social security number will only be required for sold cases)
- Date of Birth (Employee or Retiree)
- Gender (Employee or Retiree)
- Monthly Benefit (Employee or Retiree)
(For active and terminated vested deferred, we need the accrued benefit at plan termination)
- Actual Retirement Date (Retiree)
- Form of Annuity Payment
(Life, Joint and Survivor, Certain and Life, Certain, MCR, Temporary, Combinations)
- End date for Temporary Annuities
- Status (Retired, Beneficiary Receiving Payments, Disabled Receiving Payments, Active, Terminated Vested, etc.)

Only if applicable:

- Date of Birth (Joint Annuitant)
- Sex (Joint Annuitant)
- Percent Continued to Joint Annuitant or Years Certain for Certain and Life

Additional required information for any participants with deferred benefits:

- Normal Retirement Date
- Hire Date
- Service for Early Retirement Eligibility
- Normal Form of Annuity
- Employee Contributions Without Interest and Employee Contributions with Interest (if applicable)
- Other Data Required to Value Benefits (for example, prior plan benefit with different early retirement factors)

NOTE: In the event that Massachusetts Mutual Life Insurance Company (MassMutual) is awarded the business, additional information will be needed to set up benefits on our payment and recordkeeping systems.

NOTE: Please do not send any confidential or private information via e-mail.
Any confidential data should be mailed to us on diskette or CD.