

Plumbers and Pipefitters Local 219

Pension Fund

**Board of Trustees
Labor**

33 Fitch Boulevard
Austintown, Ohio 44515

Telephone (330) 270-0453
Ohio Statewide 1-800-435-2388

**Board of Trustees
Management**

Greg R. McMillen
Al Jenkins
James Swenberg



Stan Bassak, Jr.
John Kerr
Aaron Hall

Name _____

SSN _____

This is your application for Pension Benefits. Complete this form and mail it to the Administrative Office.

It is recommended that your application and the best possible proof of age which you can obtain should be sent to this office at least 1 month in advance of the month on which you want your pension benefit payments to begin.

The accuracy and completeness of the information you send to us will speed the processing of your application and provide faster payment of the benefits to which you may be entitled. Please answer all questions carefully and we would like to refer particular attention to the various forms of retirement income payments, as explained under Section III on Page 3.

If any further information is required you will be advised by the Administrative Office. You also will be notified by letter of the decision of the Pension Board regarding your application.

SECTION I--TYPE OF PENSION

<u>If eligible, I want to retire on a</u>	<u>To be eligible you must:</u>	<u>and meet this minimum pension credit requirement*</u>
<u>Check one</u> <u>Type of Pension</u>	<u>be at least</u>	
A. _____ Normal	62 or over	5 or more years of service
B. _____ Early	55 to 62	5 or more years of Service
C. _____ Disability	No age requirement	5 years of service and actively participating in the Plan
D. _____ Special Disability	No age Requirement	5 years of service and actively participating in the Plan (Must provide copy of application pending with Social Security)

If you checked Disability, have your physician provide proof of disability.

*These are the general rules. The Plan contains the specific requirements which apply for each type of pension.

SECTION II -- PERSONAL INFORMATION

Name _____ Social Security Number _____

Permanent mailing address _____
Number and Street

_____ City and State Zip code

Telephone Number _____ Local Union No. _____

Date of birth _____ Last Date Worked _____

Name of Spouse _____

Spouse's Date of Birth _____

Spouse's Social Security Number _____

Date of Retirement _____

During your active participation in the Pension Fund, did you engage in qualified military service?
_____ Yes _____ No

Complete this section ONLY if you are applying for a total and permanent DISABILITY PENSION BENEFIT.

a) Nature of your disability _____

b) Date you first became disabled _____
Month Year

c) Name of your physician _____

d) Date you were first treated for your disability _____

e) Have you applied for a Social Security Disability Award? Yes _____ No _____

Have you received a Social Security Disability Award? Yes ___ No ___ (if yes, enclose copy)

Have you been denied a Social Security Disability Award? Yes ___ No ___

SECTION III -- ELECTION OF FORM OF RETIREMENT

- _____ I elect to receive the Life Annuity pension benefit which provides for equal monthly installments payable for the rest of my life. No further benefits are provided after my death.
- _____ I elect to receive the 10 Year Certain and Life pension benefit, which provides for equal monthly installments payable for the rest of my life. If I die before I receive 120 monthly payments, payments will continue to my beneficiary for the balance of the 120 month period.
- _____ I elect to receive the 50% Joint and Survivor annuity benefit. This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, one-half (50 percent) of my reduced pension shall continue during the remaining lifetime of my beneficiary. In the event my contingent annuitant dies prior to me, my monthly benefit will "pop up" to the amount that would have been payable had the benefit not been reduced for the 50% Joint and Survivor option.
- _____ I elect to receive the 66 2/3% Joint and Survivor annuity benefit. This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 66 2/3% of my reduced pension shall continue during the remaining lifetime of my beneficiary. In the event my contingent annuitant dies prior to me, my monthly benefit will "pop up" to the amount that would have been payable had the benefit not been reduced for the 66 2/3% Joint and Survivor option.
- _____ I elect to receive the 75% Joint and Survivor annuity benefit. This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 75% of my reduced pension shall continue during the remaining lifetime of my beneficiary. In the event my contingent annuitant dies prior to me, my monthly benefit will "pop up" to the amount that would have been payable had the benefit not been reduced for the 75% Joint and Survivor option.
- _____ I elect to receive the 100% Joint and Survivor annuity benefit. This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 100% percent of my reduced pension shall continue during the remaining lifetime of my beneficiary. In the event my contingent annuitant dies prior to me, my monthly benefit will "pop up" to the amount that would have been payable had the benefit not been reduced for the 100% Joint and Survivor option.

- _____ I elect to receive the 50% Joint and Survivor annuity benefit without a “pop up.” This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, one-half (50 percent) of my reduced pension shall continue during the remaining lifetime of my beneficiary.
- _____ I elect to receive the 66 2/3% Joint and Survivor annuity benefit without a “pop up.” This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 66 2/3% of my reduced pension shall continue during the remaining lifetime of my beneficiary.
- _____ I elect to receive the 75% Joint and Survivor annuity benefit without a “pop up.” This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 75% of my reduced pension shall continue during the remaining lifetime of my beneficiary.
- _____ I elect to receive the 100% Joint and Survivor annuity benefit without a “pop up.” This is a reduced pension benefit paid to me during my lifetime. If my beneficiary is alive at the time of my death, 100% percent of my reduced pension shall continue during the remaining lifetime of my beneficiary.

Under federal law, the Plan is required to provide you a comparison of the relative value of the optional forms of benefit available under the Plan in lieu of the qualified joint and survivor annuity which is the normal form of benefit for a married person. The relative value comparison is intended to help you compare the total value of benefit distributions paid in different forms. The relative value calculation is made by converting the value of the joint and survivor annuity to the value of the single life annuity using interest rate and life expectancy assumptions (7% and 1983 Group Annuity Mortality Table) and comparing it to the optional forms. All comparisons are based on the average life expectancies for someone at you and your spouse’s ages. The ultimate value of any optional form of benefit will depend on how long you actually live. *Every optional form of benefit under the Plan has an approximately equal value to the regular or normal form of benefit.*

SECTION V -- SURVIVOR ANNUITY WAIVER

Name of Participant _____

ELECTION TO WAIVE JOINT AND SPOUSE SURVIVOR ANNUITY

As a Participant in the Plumbers & Pipefitters Local 219 Pension Plan, I hereby acknowledge that I have been informed by the Plan Administrator that my benefits under the Plan will be paid to me in the form of a Joint and Spouse Survivor annuity; that I have the right to waive that form of payment, provided that my spouse consents in writing to the waiver, that I understand the terms of a Joint and Spouse Survivor annuity and the financial effect of a waiver; and that I may revoke any waiver in effect during the applicable election period.

() I hereby elect to waive the Joint and Spouse Survivor annuity form of payment.

EXECUTED this _____ day of _____, 20_____.

Witnessed by:

Participant

Notary Public

SPOUSE'S CONSENT TO WAIVER

I, _____, am the spouse of _____. I understand that I have the right to have the Plumbers & Pipefitters Local 219 Pension Plan pay my spouse's retirement benefits in the form of a QJSA and I agree to give up that right. I understand that by signing this Agreement, I may receive less money than I would have received under this QJSA form and I may receive no benefits after my spouse dies, depending upon the payment form and beneficiary my spouse chooses.

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 payments from the Plan in the QJSA payment form in either the 50%, 75%, or 100% survivor annuity form as elected in the attached Application for Benefits.

EXECUTED this _____ day of _____, 20_____.

Witnessed by:

Participant's Spouse

Notary Public

AFFIDAVIT OF TERMINATION

STATE OF _____)
) ss:
COUNTY OF _____)

I, _____, being first duly sworn according to law, do hereby depose
(Print Name)
and state:

My Social Security Number is _____. I have worked in the jurisdiction of Local Union No. 219 of the Plumbers & Pipefitters Local No. 219 of the United States and Canada (hereinafter "Union") under the terms and conditions of a collective bargaining agreement (hereinafter "Agreement") between the Union and the signatory employers and have had contributions paid on my behalf to the Plumbers & Pipefitters Local 219 Pension Fund (hereinafter "Plan"). I acknowledge I have made an application for benefits pursuant to the Plan, and affirm the following:

1. I am not working in the Plumbing and Pipefitting trade or work generally related to the trade and craft and which is performed within the geographic area covered by the Plan.

2. My current residence is _____,
(Street Address)

_____, _____, _____
(City) (State) (Zip)

3. My current employment status is _____
(Retired, Employed, Disabled)

4. I am employed as a _____
(Job Classification/Description)
for _____ at _____
(Name of Employer) (Address of Employer)

Further Affiant sayeth naught.

Date: _____

(Signature)

Sworn to before me and subscribed in my presence this _____
day of _____, 20____.

Notary Public

SECTION VI – DESIGNATION OF BENEFICIARY

Name _____ Sex _____

SSN _____ Relationship _____

Date of Birth _____

Address _____
(Street and Number)

(City, State, and Zip Code)

I hereby apply for a pension from the Plumbers & Pipefitters Local 219 Pension Fund. I certify under penalty of perjury that all the statements contained herein are true and correct to the best of my knowledge. I understand that a false statement may disqualify me for pension benefits and that the Trustees shall have the right to recover any payment made to me because of a false statement.

SECTION VIII -- SIGNATURES

Signature of Applicant _____ Date _____

Signature of Spouse _____ Date _____

Witness _____ Date _____

Instructions on Required Proofs

Proof of birth date must be furnished for applicant and his joint annuitant, if any. Older documents, such as birth certificates, are preferred to those more recently established. Documents submitted will be photocopied or recorded and returned to you. One or more of the following are suggested. If we may advise you further, please let us know.

1. A birth certificate or delayed birth certificate.
2. A baptismal certificate or a statement as to the date of birth shown by a church record, certified by the custodian of such records.
3. Hospital birth record, certified by the custodian of such record.
4. Letter from Social Security Administration certifying your date of birth as established for their records. This may be obtained from your local agency.
5. A foreign Church or Government record with a notarized translation.
6. A signed statement by the physician or midwife who was in attendance at birth, as to the date of birth shown on their records.
7. Family Bible, or other family record. (Don't remove pages from Bible).
8. An insurance policy which shows the age or date of birth*, whether lapsed or active.
9. Naturalization records;
 - a) Certificate of Naturalization*
 - b) Intent to become a Citizen*
 - c) Citizen Identification Card*
10. Immigration Records*
11. Passport*
12. Other government records (Bureau of Census, Washington 25, D.C., will search its records for age evidence upon the execution of an application and the payment of a fee.)*
13. School Records.*
14. Military Records.*

Documents must show month, day, and year of birth. Those marked with an asterisk () may require additional evidence of birthdate.

DIRECT DEPOSIT AUTHORIZATION FORM

AUTHORIZATION AGREEMENT FOR DIRECT DEPOSITS

I hereby authorize direct deposit of my pension check from the Plumbers & Pipefitters
Local No. 219 Pension Fund to the following bank account:

Checking Account No. _____
(Attach copy of voided check)

Savings Account No. _____

Bank Name _____

City _____ State _____ Zip _____

Routing No. _____

This authority is to remain in full force and effect until written notification from me of its termination.

Name (please print) _____

Social Security No. _____

Signature _____ Date _____