

**International Union of Operating Engineers Benefit Funds of Eastern Pennsylvania & Delaware  
Pension, Annuity, & Welfare Beneficiary Designation Form**

Last Name	First Name	Middle Initial	Social Security Number	Marital Status
Street Address			City	State
Zip Code				

<b>1. Pension Plan</b> <span style="float: right;"><i>If you are vested and married, your spouse is automatically your primary beneficiary under the Pension plan. You may elect anyone as your contingent Beneficiary.</i></span>				
* - If Eligible				
<b>Primary</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code
<b>Contingent</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code

<b>2. Annuity Plan</b> <span style="float: right;"><i>If you are married your spouse is automatically your primary beneficiary under the Annuity plan. You may elect anyone as your contingent Beneficiary.</i></span>				
* - If Eligible				
<b>Primary</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code
<b>Contingent</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code

<b>3. \$5000 Death Benefit</b> <span style="float: right;"><i>Regardless of Marital Status, you may elect anyone as beneficiary(s).</i></span>				
* - If Eligible				
<b>Primary</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code
<b>Contingent</b>	Name(s)		Relationship	
Social Security		Phone Number		Date of Birth
Address				
City			State	Zip Code

_____ <b>Signature</b>	_____ <b>Date</b>
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## Instruction Sheet for Beneficiary Designation Form

Please read carefully.

Contact the Funds Office with any questions, 800 - 233 - 2043

PLEASE NOTE - This sheet is to be used as a guide.

For a Full explanation of benefits, please refer to the highlights booklet or the actual plan documents.

This is NOT a census/dependent form. A separate form needs to be filled out to add/delete a dependent.

You can name the **same person** for **all three benefits**, but you must fill out all three sections.

Please remember to **sign and date** this form.

**Primary Beneficiary:** This is the individual (or individuals) that you would like to receive payment in the event of your death.

**Contingent Beneficiary:** Will only receive payment if your Primary Beneficiary is no longer alive at the time of your death.

**In the case of a divorce:** the spouse's status as Beneficiary shall terminate immediately upon a judgement or decree of divorce.

A member can name their ex-spouse as Primary but the designation must be signed and dated after the divorce decree.

### 1. Pension Plan

Active

Single and NOT Vested

If you were credited with at least a half a credit in any 1 of the 3 plan years before your death, your beneficiary may receive \$1,000 for each pension credit you earned.

Single and Vested

Your beneficiary may receive a lump sum equal to 75 times the monthly benefit you would have received had you retired on the day you died.

Married and NOT Vested

Same as "Single and NOT Vested".

**Married and Vested and eligible to retire on a Special Early Pension, your beneficiary may receive:**

A monthly benefit for life equal to 50% of the Joint & Survivor amount you are entitled to  
AND 75 times your monthly benefit calculated as if you had retired on the day you died.

**Married and Vested and NOT eligible for Special Early Pension, your beneficiary may receive:**

A monthly benefit for life equal to 50% of the Joint & Survivor amount you are entitled to  
OR 75 times your monthly benefit calculated as if you had retired on the day you died.

*A member must have been actively engaged in covered employment to qualify for the 75 Guaranteed Payments.*

### 2. Annuity Plan

On the first day of covered employment you are automatically enrolled in this Plan

Single

You can name anyone as your Primary beneficiary.

Married

Your Spouse is your primary beneficiary.

### 3. \$5,000 Death Benefit

Your beneficiary may get the Death Benefit if you meet the following requirements:

Active

NOT Vested

If you were credited with at least 1,000 hours in the 24 months prior to your death.

Vested

If you were credited with at least 500 hours in the 24 months prior to your death.

If your death is deemed accidental and occurs within 120 days of the accident, your beneficiary will receive an additional \$5000.