

International Union of Operating Engineers Benefit Plans Of Eastern Pennsylvania and Delaware

1375 Virginia Drive, Suite 245, Fort Washington, PA 19034

Phone (215) 542-8211

www.iuoe542funds.com

APPLICATION FOR PENSION

I _____ hereby apply for benefits from the

(please print name)

International Union of Operating Engineers Pension Fund of Eastern Pennsylvania and Delaware,
with an Effective Date of _____. My last date of covered
employment was (will be) _____.

Home Address _____

City/State/Zip Code _____

Home Telephone including Area Code _____

Social Security Number _____

Date of Birth _____

(a Birth Certificate or other original proof of age must be included with application)

Have you ever collected pension benefits from Local 542 before? _____ NO _____ YES

If YES, when? _____

Are you/will you be collecting pension benefits from any other Local of the International Union of
Operating Engineers? _____ NO _____ YES

If YES, which Local(s)? _____

The statements made by me on this pension application are true to the best of my knowledge and
belief. I understand that a false statement may disqualify me for pension benefits and that the
Trustees shall have the right to recover any payments made to me because of false statement.

Signature

Date

TYPE OF PENSION BENEFIT

TYPE OF PENSION FOR WHICH YOU ARE APPLYING: (check only one)

_____ **NORMAL VESTED PENSION** (Age 65 or older)

_____ **SPECIAL EARLY RETIREMENT PENSION**
(Age 55 or older but younger than age 65 with age plus credits totaling 80 or more)

_____ **EARLY RETIREMENT PENSION**
(Age 55 or older but younger than age 65 with age plus credits totaling less than 80)

_____ **DEFERRED PENSION**
(Age 55 or older with no pension credits in the last two years)

_____ **DISABILITY PENSION** (Any age) *(Please complete the following questions)*

a) Have you applied for Social Security Benefits?

_____ yes _____ no If yes, what is the status of your application?
_____ approved _____ rejected _____ pending

CERTIFICATION OF MARITAL STATUS (To be completed by all Participants)

_____ I am currently legally married.

_____ I am not legally married at this time, and:

_____ I have never been married

_____ I have been married but my marriage was terminated:

_____ by death (attach copy of death certificate)

_____ by divorce (attach copy of divorce decree)

BENEFICIARY DESIGNATION

SECTION I. FOR MARRIED PARTICIPANTS ONLY

Please complete **only one** of the following A through G:

A. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **50%** pension payable to my spouse upon my death. (Please include birth certificates for both you and your spouse, and your marriage certificate)

Spouse's Full Name (please print) Date of birth Social Security Number

Participant's Signature Date

B. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **75%** pension payable to my spouse upon my death. (*Please include birth certificates for both you and your spouse, and your marriage certificate*)

Spouse's Full Name (please print) Date of birth Social Security Number

Participant's Signature Date

C. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **100%** pension payable to my spouse upon my death. (*Please include birth certificates for both you and your spouse, and your marriage certificate*)

Spouse's Full Name (please print) Date of birth Social Security Number

Participant's Signature Date

SECTION I. FOR MARRIED PARTICIPANTS ONLY

D. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **50%** pension payable to my **designated beneficiary** upon my death. (Please include birth certificates for both you and your designated beneficiary)

_____ Beneficiary's Full Name (please print)	_____ Date of birth	_____ Social Security Number
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Relationship to Plan Participant _____

Address: _____

_____ Participant's Signature	_____ Date
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If you have elected **Option D** your spouse **MUST** consent to this election by completing the following and ***YOUR SPOUSE'S SIGNATURE MUST BE NOTARIZED.***

I hereby acknowledge the rejection of the Joint & Survivor pension and understand that I will not receive a monthly benefit upon the death of my spouse, the Plan Participant. Further, I understand that in the event my spouse dies before receiving the 75 guaranteed monthly payments, I will not be entitled to the remaining guaranteed payments unless I am the named beneficiary.

Spouse's Full Name (please print)

_____ Spouse's Signature	_____ Date
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_____ Notary	_____ Date
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SECTION I. FOR MARRIED PARTICIPANTS ONLY

E. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **75%** pension payable to my **designated beneficiary** upon my death. (Please include birth certificates for both you and your designated beneficiary)

Please note – the Designated Beneficiary cannot be more than 10 years younger than the member for this option.

Beneficiary's Full Name (please print) _____ Date of birth _____ Social Security Number _____

Relationship to Plan Participant _____

Address: _____

Participant's Signature _____ Date _____

If you have elected **Option E** your spouse **MUST** consent to this election by completing the following and ***YOUR SPOUSE'S SIGNATURE MUST BE NOTARIZED.***

I hereby acknowledge the rejection of the Joint & Survivor pension and understand that I will not receive a monthly benefit upon the death of my spouse, the Plan Participant. Further, I understand that in the event my spouse dies before receiving the 75 guaranteed monthly payments, I will not be entitled to the remaining guaranteed payments unless I am the named beneficiary.

Spouse's Full Name (please print) _____

Spouse's Signature _____ Date _____

Notary _____ Date _____

SECTION I. FOR MARRIED PARTICIPANTS ONLY

F. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **100%** pension payable to my **designated beneficiary** upon my death. (Please include birth certificates for both you and your designated beneficiary)

Please note – the Designated Beneficiary cannot be more than 10 years younger than the member for this option.

Beneficiary's Full Name (please print) Date of birth Social Security Number

Relationship to Plan Participant _____

Address _____

Participant's Signature Date

If you have elected **Option F**, your spouse **MUST** consent to this election by completing the following and ***YOUR SPOUSE'S SIGNATURE MUST BE NOTARIZED.***

I hereby acknowledge the rejection of the Joint & Survivor pension and understand that I will not receive a monthly benefit upon the death of my spouse, the Plan Participant. Further, I understand that in the event my spouse dies before receiving the 75 guaranteed monthly payments, I will not be entitled to the remaining guaranteed payments unless I am the named beneficiary.

Spouse's Full Name (please print)

Spouse's Signature Date

Notary Date

SECTION I. FOR MARRIED PARTICIPANTS ONLY

G. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with no monthly pension benefit payable to anyone upon my death. (Please include your birth certificate)

Participant's Signature

Date

If you have elected **Option G**, your spouse **MUST** consent to this election by completing the following and ***YOUR SPOUSE'S SIGNATURE MUST BE NOTARIZED.***

I hereby acknowledge the rejection of the Joint & Survivor pension and understand that I will not receive a monthly benefit upon the death of my spouse, the Plan Participant. Further, I understand that in the event my spouse dies before receiving the 75 guaranteed monthly payments, I will not be entitled to the remaining guaranteed payments unless I am the named beneficiary.

Spouse's Full Name (please print)

Spouse's Signature

Date

Notary

Date

SECTION II. FOR NON-MARRIED PARTICIPANTS ONLY

Please complete **only one** of the following A through D:

A. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with no monthly pension benefit payable to anyone upon my death. (Please include your birth certificate)

Participant's Signature

Date

B. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **50%** pension payable to my designated beneficiary upon my death. (Please include birth certificates for both you and your designated beneficiary)

Beneficiary's Full Name (please print)

Date of birth

Social Security Number

Relationship to Plan Participant _____

Address _____

Participant's Signature

Date

SECTION II. FOR NON-MARRIED PARTICIPANTS ONLY

C. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **75%** pension payable to my designated beneficiary upon my death. (Please include birth certificates for both you and your designated beneficiary)

Please note – the Designated Beneficiary cannot be more than 10 years younger than the member for this option.

Beneficiary's Full Name (please print) Date of birth Social Security Number

Relationship to Plan Participant _____

Address _____

Participant's Signature Date

D. _____ I hereby request that Pension Benefits to which I am entitled be paid to me in the form of a lifetime pension with a **100%** pension payable to my designated beneficiary upon my death. (Please include birth certificates for both you and your designated beneficiary)

Please note – the Designated Beneficiary cannot be more than 10 years younger than the member for this option.

Beneficiary's Full Name (please print) Date of birth Social Security Number

Relationship to Plan Participant _____

Address _____

Participant's Signature Date

Direct Deposit Authorization Form

I hereby authorize the *International Union of Operating Engineers Pension Fund of Eastern Pennsylvania and Delaware* to initiate electronic transactions to my account(s) at the financial institution(s) indicated below.

Deposit of Monthly Pension Benefit

The account listed below is my **Checking Account**. I request that my net pension benefit be credited to this account.

INSTITUTION: _____

CITY: _____ STATE: _____ ZIP: _____

ROUTING NUMBER: _____

ACCOUNT NUMBER: _____

The account listed below is my **Savings Account**. I request that my net pension benefit be credited to this account.

INSTITUTION: _____

CITY: _____ STATE: _____ ZIP: _____

ROUTING NUMBER: _____

ACCOUNT NUMBER: _____

Please note that you must verify both your Routing Number and your Account Number with your bank. Make sure you tell your bank branch that you are having funds electronically transferred. This may change the Routing Number that we are to use.

Name: _____ Date: _____

Signature: _____