



**PLUMBERS LOCAL UNION NO. 519
PENSION TRUST FUND**

Dear Applicant:

Attached you will find an application for Retirement or Death benefits. Please complete all the information requested and sign your application. **Incomplete or unsigned forms may be returned, which could delay your request.**

Also enclosed for your completion and signature are the following forms: Direct Deposit Authorization (optional), Work Status Form, Retirement Declaration (for Early Retirement only), and Form W-4P. These forms should accompany your returned application along with a legible photocopy of one (1) of the following Proofs-of-Age: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, or Military records/ID. If you are married, please include a Proof-of-Age for your Spouse and a copy of your Marriage License/Certificate. If you are divorced, please submit a copy of your Divorce Decree.

You will need to provide additional supporting documents with Disability and Death benefit applications. If you are applying for Disability Retirement, you must provide the whole Social Security Disability Award which indicates the date the Social Security Administration found you disabled. If you are submitting an application for a Death benefit(s), include a copy of the Participant's Death Certificate.

Please realize that the benefit calculation process takes approximately ninety (90) days. In order to hasten this process, it is imperative that you return the signed application package, plus the applicable copies of your supporting documents to:

Plumbers Local Union No. 519 Pension Trust Fund
c/o National Employee Benefits Administrators, Inc.
2010 N.W. 150th Avenue, Suite 100
Pembroke Pines, FL 33028

Should you have any questions or concerns regarding your application, please contact the Pension Department toll free at (800) 842-5899 for assistance.

Proudly serving the Taft-Hartley community since 1994!

Corporate Headquarters
2010 Northwest 150th Avenue, Suite 100
Pembroke Pines, Florida 33028
1.800.842.5899 | Fax: 954.266.2079



RETIREMENT AND DEATH BENEFITS

APPLICATION CHECKLIST

Use this checklist to make certain that all necessary documents are signed and completed before submission to the Fund Office.

Retirement (Normal, Early or Late) – All of the following should be sent together:

Retirement Application (must indicate date of retirement & last date worked)

Form W-4P

Direct Deposit Authorization Form (optional)

Retirement Declaration Form (Early Retirement Only)

One of the following Proofs-of-Age: Birth Certificate, Passport, Driver's License, Baptismal Certificate or Military records/ID (photocopy)

If married, please include a photocopy of:

One of the following Proofs-of-Age for your Spouse: Birth Certificate, Passport, Driver's License, Baptismal Certificate, or Military records/ID

Marriage License/Certificate

If divorced, copy of Divorce Decree

Disability Retirement – All of the following should be sent together:

Disability Retirement Application

Disability Award from SSA

Form W-4P

Direct Deposit Authorization Form (optional)

One of the following Proofs-of-Age: Birth Certificate, Passport, Driver's License, Baptismal Certificate or Military records/ID (photocopy)

If married, please include a photocopy of:

One of the following Proofs-of-Age for your Spouse: Birth Certificate, Passport, Driver's License, Baptismal Certificate or Military records/ID

Marriage License/Certificate

If divorced, copy of Divorce Decree

Death Benefit Claim – All of the following should be sent together:

Application for Death Benefits

Death Certificate of Member

Form W-4P

Direct Deposit Authorization Form (optional)

Other Beneficiaries must include a photocopy of:

One of the following: Birth Certificate, Passport, Driver's License, Baptismal Certificate or Military records/ID

Surviving Spouse must include a photocopy of:

One of the following Proofs-of-Age: Birth Certificate, Passport, Driver's License, Baptismal Certificate or Military records/ID

Marriage License/Certificate