

PLUMBERS & PIPEFITTERS LOCAL UNION NO. 630 PENSION-ANNUITY 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) and a FormW-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 Proof-of-Age for your Spouse and a copy of your Marriage License/Certificate.

If you are applying for Early Retirement you will need to complete and submit the enclosed "Retirement Declaration" and "Working Status" forms.

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 entire Disability Award Certificate issued by the Social Security Administration. If you are submitting an application for a Death benefit, 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:

<p>Plumbers & Pipefitters LU 630 Pension-Annuity Trust Fund c/o National Employee Benefits Administrators, Inc. 2010 N.W. 150th Avenue, Suite 100 Pembroke Pines, FL 33028</p>

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

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)

One of the following Proofs-of-Age: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, Military records/ID (photocopy)

One of the following Proofs-of-Age for your Spouse: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, or Military records/ID

Marriage License/Certificate

If Early Retirement, Affidavits Acknowledging Severance of Employment

If married, please include a photocopy of:

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, Drivers License, Baptismal Certificate, Naturalization papers, Military records/ID (photocopy)

If married, please include a photocopy of:

One of the following Proofs-of-Age for your Spouse: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, or Military records/ID

Marriage License/Certificate

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

Application for Death Benefits

Death Certificate of Member

Other Beneficiaries must include a photocopy of:

One of the following: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, or Military records/ID

Surviving Spouse must include a photocopy of:

One of the following Proofs-of-Age: Birth Certificate, Passport, Drivers License, Baptismal Certificate, Naturalization papers, or Military records/ID

Marriage License/Certificate