

SHEET METAL, AIR, RAIL and TRANSPORTATION ASSOCIATION LOCAL UNION NO. 33 YOUNGSTOWN DISTRICT PENSION FUND

33 Fitch Boulevard
Austintown, Ohio 44515



Telephone (330) 270-0453
Toll Free 1-800-589-8041

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 for both you and your spouse 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>Check one</u>	<u>Type of Pension</u>	<u>be at least</u>	<u>and meet this minimum pension credit requirement*</u>
A. _____	Normal-Class A Workers Class B and Residential	57 or over	5 or more years of service
B. _____	Early-Class A Workers Class B and Residential	62 or over 55 to 57 55 to 62	5 or more years of service
C. _____	Disability	No age requirement	5 or more years of service and earned 155 hours of work in covered employment within the 24 months prior to date of disability
D. _____	Social Security Level Income	55 to 65	5 or more years of service

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

If you checked Social Security Level Income option, you must provide the Fund Office with a "benefits estimate statement" from the Social Security Administration.

*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 Lifetime Level Income Benefit Option which provides a monthly payment until age 62. At age 62 and after, I will receive a reduced monthly benefit. Benefits will cease in the month of my death.

_____ 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 life of and shall be paid to such beneficiary.

_____ 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 percent of my reduced pension shall continue during the life of and shall be paid to such beneficiary.

_____ 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 life of and shall be paid to such beneficiary.

_____ I elect to receive the single life annuity pension benefit, which provides for equal monthly installments payable for the rest of my life. If I die before I receive 60 monthly payments, payments will continue to my beneficiary for the balance of the 60 month period.

_____ I elect to receive the 50% Joint and Survivor Level Income Benefit Option, which provides a monthly payment until age 62. At age 62 and after, I will receive a reduced monthly benefit. If my contingent annuitant is alive at the time of my death, one-half (50 percent) of my reduced pension shall continue during the remaining lifetime of my contingent annuitant.

_____ I elect to receive the 75% Joint and Survivor Level Income Benefit Option, which provides a monthly payment until age 62. At age 62 and after, I will receive a reduced monthly benefit. If my contingent annuitant is alive at the time of my death, 75 percent of my reduced pension shall continue during the remaining lifetime of my contingent annuitant.

_____ I elect to receive the 100% Joint and Survivor Level Income Benefit Option, which provides a monthly payment until age 62. At age 62 and after, I will receive a reduced monthly benefit. If my contingent annuitant is alive at the time of my death, 100 percent of my reduced pension shall continue during the remaining lifetime of my contingent annuitant.

SECTION IV -- SURVIVOR ANNUITY WAIVER

Name of Participant _____

ELECTION TO WAIVE JOINT AND SPOUSE SURVIVOR ANNUITY

As a Participant in the Sheet Metal Workers Youngstown District Pension Fund, 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 hereby consent to the foregoing election by my spouse, not to have benefits under the Sheet Metal Workers Youngstown District Pension Plan paid in the form of a Joint and Spouse Survivor annuity. Further, I hereby acknowledge that I understand: (a) that the effect of my consent may be to forfeit benefits I would be entitled to receive upon my spouse's death; (b) that my spouse's waiver is not valid unless I consent to it; and (c) that my consent is irrevocable unless my spouse revokes the waiver during the applicable election period.

EXECUTED this _____ day of _____, 20_____.

Participant's Spouse

Witnessed by:

Notary Public

SECTION V -- AFFIDAVIT OF TERMINATION

STATE OF _____)
) ss:
COUNTY OF _____)

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

My Social Security Number is _____. I have worked in the jurisdiction of Local Union No. 33 of the Sheet Metal Workers' International Association of the United States (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 Sheet Metal Workers Youngstown District 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 sheet metal 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)
_____ and my telephone number is _____.
(State) (Zip)
3. My current employment status is _____
(Retired, Employed, Disabled)
4. I am employed as a _____ for
(Job Classification/Description)
_____ 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 Sheet Metal Workers Youngstown District 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.