

PENSION APPLICATION

Iron Worker's Name: _____ Social Security No.: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone No.: (_____) _____ Date of Birth ____/____/____

Local Union Number: _____ Book Number: _____

Marital Status: Single Married Widow(er) Divorced Separated

If you are married or separated, please complete the following:

Spouse's Full Legal Name (if Applicable): _____

Spouse's Date of Birth: ____/____/____ Spouse's Social Security No.: _____ - _____ - _____

Date of Marriage: ____/____/____

PENSION ELECTION (Check Only One):

<input type="checkbox"/>	Regular	Age 62 or older with at least 5 Pension Credits or 5 Vested Credits (or at least 65 with 5 years of participation) and have not left Covered Employment.
<input type="checkbox"/>	30 and Out Service	At least age 55 but not yet 62 and have not left covered employment. Pension Credits earned prior to 2005 + Vesting Service on or after 2005 equal to at least 30. Pension Credits earned after 1/1/2010 are reduced by 0.375% per month prior to age 62, unless you have 30 Vested Credits.
<input type="checkbox"/>	100 and Out Service	At least Age 58 but not yet 62 and have not left covered employment. Your age plus your Pension Credits are equal to at least 100.
<input type="checkbox"/>	Early Retirement	At least age 55 but not yet 62 and have not left covered employment. You must have at least 15 Pension Credits. Pension amount reduced by 0.5% per month prior to age 62.
<input type="checkbox"/>	Deferred	You have left Covered Employment but would otherwise qualify for a Regular, Service or Early Retirement pension. Benefits are determined by the rules in effect when you left covered employment. (10 Credit minimum prior to 2/1/1989)
<input type="checkbox"/>	Regular Disability	Under age 62 and TOTALLY AND PERMANENTLY DISABLED . You must have at least 5 Pension Credits or 5 Vested Credits. You must apply within 12 months and have at least 500 hours in the 24 months before disability. You must have either 30 Pension Credits OR a Social Security Award.
<input type="checkbox"/>	Auxiliary Disability	Under age 62 and TOTALLY AND PERMANENTLY DISABLED , but not eligible for a Regular Disability pension. You must have at least 5 Pension Credits or 5 Vested Credits. You must apply within 12 months and have at least 500 hours in the 24 months before disability. This benefit is limited to 24 months.
<input type="checkbox"/>	Pro Rata (Partial)	If you have less than 5 Pension Credits or 5 Vested Credits, but combined service with another Ironworker Pension plan would make you eligible for a Regular, Service Early Retirement pension. You must have either 2 Vested Credits prior to 1983 or 250 hours after 1/1/1983.

***You have left Covered Employment when you have fewer than 250 hours in one full calendar year.**

****Eligibility is subject to the official plan rules. The above brief descriptions are not all-inclusive.**

Retirement Date:

You are eligible to receive your benefit on the first day of the month in which you meet the requirements of the plan and receive Board Approval to commence your pension benefit. You must submit this application prior to your intended effective date, and you must stop ironworking before your pension benefit can commence.

Please provide the month and year you wish to commence your benefit: _____, 20____.

Pension Credits Outside our District Council:

Please indicate any Iron Worker Local Unions **NOT** within our District Council where you may have worked, have pension credits, or have already retired from.

(Local Unions within our district include: 22, 44, 70, 147, 172, 290, 292, 769, 787. (Formerly 301, 372, 379, 439))

Local Union:	Worked From:	Worked To:



Documents Needed to Process Your Application:

Copies of the following documents are **required** to process your Pension Application. Please return all that apply with your Pension Application.

Applies To:	Document(s) Needed:
All Applicants	Your Birth Certificate
Divorced Applicants	If you were ever divorced after your career as an ironworker began, include Divorce Decree(s), Property Settlement Agreement(s), or Qualified Domestic Relation Order(s)
Married Applicants	Your Marriage Certificate
Married Applicants	Your Spouse's signed Social Security Card
Disabled Applicants	Disability Pension Applicants must provide an original Disability Pension Examination Report signed by the physician. If you have a Social Security Notice of Award, provide a complete copy.

I hereby apply for a Pension from the Iron Workers District Council of Southern Ohio and Vicinity Pension Trust. I certify that all statements in this application are true to the best of my knowledge and belief. If a Pension is granted to me, I agree to be bound by all the Rules and Regulations of the Pension Plan. I understand that this application is not a guarantee of benefits and the rules of the plan prevail.

X

Iron Worker's Signature

Date