

The Southern California IBEW-NECA Trust Funds recently mailed the Annual Pensioner Verification package to all pensioners. Below are Frequently Asked Questions regarding this process:

1. I received a similar package last year, do I need to complete the papers again?

Yes. The Annual Pensioner Verification packages are sent every year to pensioners. All forms must be completed annually. Failure to complete the forms may result in the suspension of your monthly pension benefit.

2. Why is there an Annual Pensioner Verification Process?

Under a federal law known as ERISA, the Trustees have a fiduciary obligation to ensure that pension benefits are not paid to pensioners who are engaged in activities which could lead to the suspension of their monthly pension benefit under the Plan's Suspension of Benefit Rules. To discharge in part that fiduciary obligation, the Trustees require all pensioners to complete, on an annual basis, an Annual Pensioner Verification form. Completion and return of the form is "self-reporting" by an individual pensioner as to activities performed during the preceding calendar year.

3. I retired last year, but I worked for part of the year prior to retirement. Do I need to list that employer?

Yes. You must report all employers you worked for during the 2009 calendar year (January 1, 2009 through December 31, 2009).

4. Where do I send the forms?

ALL completed forms must be returned to the Southern California IBEW-NECA Administrative Trust Funds office. A return envelope was included in the mailing for your convenience.

5. Do I need to include a payment of \$15 for the Request for Social Security Earnings Information?

No, you do not need to include a payment. You must return the Social Security Earnings Information form to the Southern California IBEW-NECA Trust Funds. The Administrative Trust Funds Office will process the form.

6. Do I need to date the Request for Social Security Earnings Information Form?

No. Please do not date the form. Do complete all the lightly shaded areas of the form: name, last four (4) digits of your social security number and date of birth. Sign the form and provide a daytime phone number.

The Southern California IBEW-NECA Administrative Trust Office is here to assist you if you have questions or need assistance completing the forms related to the Annual Pensioner Verification Process. You may contact the Administrative Trust Funds Office at (323) 221-5861 or 1-800-824-6935.