



SOUTHERN CALIFORNIA IBEW - NECA ADMINISTRATIVE CORPORATION

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Date: February 2024

TO: Participants, Alternate Payees and Beneficiaries of the Southern California IBEW-NECA Defined Contribution Trust Fund

FROM: Southern California IBEW-NECA Administrative Trust Funds Office

RE: Recently Adopted Plan Amendment

Enclosed is a recently adopted amendment to the Southern California IBEW-NECA Defined Contribution Trust Fund. Please read the amendment in its entirety for a complete description. Please keep a copy of this notice with your Summary Plan Description.

If you have any questions about these amendments, please contact the Retirement Benefits Department Monday through Friday between the hours of 8:30 a.m. and 5:30 p.m. at (800) 824-6935 or (323) 221-5861.

➤ **Amendment 18 – Beneficiary**

Article VIII, Section 4 is amended to add the following text: If no estate of the participant is established by probate proceedings or other operation of law, or if payment cannot be made to the estate, the benefit shall be forfeited in accordance with Article IV, Section 1, and such amounts so forfeited shall be used to reduce Plan expenses.

**AMENDMENT NO. 18
TO THE
SOUTHERN CALIFORNIA IBEW-NECA DEFINED CONTRIBUTION PLAN**

This Amendment to the Southern California IBEW-NECA Defined Contribution Plan (the “Plan”) executed by the Chair and Secretary on the date set forth below, is made by the Board of Trustees of the Southern California IBEW-NECA Defined Contribution Trust Fund (the “Board of Trustees”) with reference to the following facts and circumstances.

The Board of Trustees has reserved the ability to amend the Plan from time to time. The Board of Trustees wishes to adopt a provision in the Plan to allow for the forfeiture of benefits where a benefit is payable to an estate but an estate is not established or payment cannot be made to an estate.

Accordingly, pursuant to Article IX, Section 10 of the Plan, the Plan is amended effective February 1, 2024, as follows:

Article VIII, Section 4 is amended to read as follows (new text in bold):

Section 4: Beneficiary. If a Participant is married, his Beneficiary will be his spouse, unless his spouse has provided written and notarized consent to the designation of another beneficiary. If a Participant is not married, his Beneficiary will be the person designated by the Participant in a form satisfactory to the Trustees. If no Beneficiary has been designated by an unmarried Participant, or if a designated Beneficiary predeceases an unmarried Participant, payment will be made to the surviving person or persons in the first of the following classes of successive preference Beneficiaries in which a member survives the Participant.

(a) his children, including legally adopted children,

(b) his parents, and


(c) his brothers and sisters.


In determining such person or persons, the Trustees may rely upon an affidavit by a member of any of the classes of preference Beneficiaries. Payment based upon such affidavit shall be full acquittance of any benefit payable under the Plan and release of liability against the Board of Trustees unless, before the payment is made, the Trustees have received written notice of a valid claim by some other person. If two or more in a class persons become entitled to benefits as preference Beneficiaries, they shall share equally. If no preference beneficiaries survive the Participant, then the Participant's account shall be distributed to the Participant's estate in accordance with applicable state law. **If no estate of the Participant is established by probate proceedings or other operation of law, or if**

payment cannot be made to the estate, the benefit shall be forfeited in accordance with Article IV, Section 1, and such amounts so forfeited shall be used to reduce Plan expenses.

Any death benefit payable to a minor under age 18 may be paid to the legally appointed guardian of the minor or, if there be no such guardian, to such adults as have, in the opinion of the Trustees, assumed the custody and principal support of said minor.

Executed this 1st day of February, 2024 at Pasadena, California.


Chairman, Robert Corona
Southern California IBEW-NECA
Defined Contribution Plan


Secretary, Eric Cartier
Southern California IBEW-NECA
Defined Contribution Plan