I HEREBY CERTIFY THAT [Please initial the applicable choice]:

_____ I am regularly receiving and endorsing my monthly pension check.

_____ My monthly pension check is directly deposited into my bank account.

_____ I have Financial Power of Attorney and acknowledge responsibility to notify the Fund upon death of pensioner or changes to the Financial Power of Attorney. (Please include a copy of Financial Power of Attorney or call Fund office to confirm we have one on file.

I FURTHER CERTIFY THAT [Please initial the applicable choice]:

_____ I am not working in disqualifying employment, (see side 2).

_____ I am working in disqualifying employment, (see side 2), but I am over age 65 and work less than forty hours a month.

_____ I am under age 65 and working in disqualifying employment, (see side 2).

The undersigned hereby certifies that they are alive and are a pensioner, beneficiary, or alternate payee of the Teamsters Local 786 Lumber Employees' Retirement Fund. The undersigned understands that failure to sign and return this executed and notarized Certification may result in a temporary suspension or termination of their benefits. Under penalties of perjury, the undersigned certifies that all the above statements are true and correct. The undersigned understands that false statements on this form can subject them to civil and/or criminal liability.

SIGNED _____ DATE: _____

NAME: _____ ADDRESS: _____
(please print)

CITY: _____ STATE: _____ ZIP: _____

PHONE: _____ CELL: _____ SS#: _____

EMAIL: _____

☐**PLEASE CHECK IF THIS IS A NEW ADDRESS**

STATE OF _____)
)SS
COUNTY OF _____)

Personally sworn to before me this _____ day of _____, 20___.

_____ _____
Notary Public My Commission Expires

Return this Certification to: Teamsters Local 786 Lumber Employees Retirement Fund
300 S. Ashland – Suite 500, Chicago, IL 60607. Fax # 312-666-0391 or Email: rlacalamita@786benefits.org

REEMPLOYMENT NOTIFICATION REQUIREMENTS

If you are working or return to work in the trade or business similar to that covered by the collective bargaining agreement for Teamsters Local 786 Lumber Employees' Retirement Fund, your monthly benefits may be subject to suspension for each month you are employed in such prohibited employment. Suspension will depend on whether you have achieved Normal Retirement Agre (age 65) when you reenter the workforce, the type of work you are performing and the area in which you are working.

If you are under age 65 and working or return to work in the trade or business similar to that covered by the collective bargaining agreement for Teamsters Local 786 Lumber Employees' Retirement Fund, then your monthly benefits will be suspended in accordance with the following rules:

If you are working in "Disqualifying Employment" for 40 or more hours per month then your benefits will be suspended.

Disqualifying Employment means:

employment in the bargaining units described in the collective bargaining agreement or have provided/do provide for contributions to the Plan; or

employment by the Union or the Fund; or

self-employment in the same or related business as any Employer.

For purposes of the foregoing, there is no limit to the geographical area covered.

If you are working for any amount of time in "Totally Disqualifying Employment" then your benefits will be suspended.

Totally Disqualifying Employment means any employment not for a Contributing Employer that is:

In an industry covered by the Plan when the pension began;

"industry covered by the Plan" means the Lumber Employees' Industry and any other industry in which Employees are covered by the Plan were employment when the pension began.

In the geographic area covered by the Plan when the pension began; and

"geographic area covered by the Plan" means:

Illinois and the metropolitan area which falls in part in Illinois (e.g., the Chicago metro area in Indiana) and any other area covered by the Plan when the pension began.

Any area covered by a reciprocal plan.

In any occupation in which the participant worked under the Plan at any time or any occupation covered by the Plan at the time the pension began.

If you are over age 65 and working or return to work in Totally Disqualifying Employment (as defined above) for 40 or more hours per month then your benefits will be suspended.

It is your responsibility to notify the Fund Office of any employment that may be considered "disqualifying employment". If you do not, your pension may be suspended to recover benefits paid that you were not entitled to receive. There may also be additional penalties imposed.

Please contact the Fund Office with any questions you may have about disqualifying employment.

Are there any circumstances when my benefit will not be suspended for such work in the trade or business after my retirement?

If you are under age 65, then you may work up to 39 hours per month for a Contributing Employer in the trade or business without any suspension or reduction in benefits.

If you are over age 65, then you may work as much as you want provided you may not work more than 39 hours per month in Totally Disqualifying Employment. Once you reach age 72, you may work unlimited hours in the trade or business with no suspension or reduction in benefits. However, if you work for a non-Contributing Employer in the trade or business of the Union, your benefits will be suspended during such period.