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PLUMBERS AND STEAMFITTERS
LOCAL UNION 33
 PENSION FUND

BUILDING
 UNION
 IS GOOD
 BUSINESS

Retirement Checklist

Local 33 members participate in the following 2 retirement plans:

1. **National Pension** – The National Pension Fund is administered in Alexandria, Virginia and is separate from the Local 33 Pension Fund. You may reach them by phone at **1-800-638-7442** or at **www.ppnpf.org**
2. **Local 33 Pension** – The Local 33 Pension Plan is administered by Jama Barbour at the Local 33 Fund Office. You may reach the Fund Office at the address, phone or email **contained at the top and bottom of this document.**

Plumbers & Steamfitters Local 33 Pension:

Once you have decided on a retirement date use the following checklist to complete the Local 33 application process:

STEP 1:

<u>WHAT</u>	<u>WHEN</u>
Request the Local 33 Pension Application from the Fund Office	As soon as you have chosen a retirement date

STEP 2:

<u>WHAT</u>	<u>WHEN</u>
Complete the Local 33 Pension Application and submit to the Fund Office. You must include: <ul style="list-style-type: none"> ○ Birth Certificate ○ Marriage Certificate ○ Birth Certificate of Spouse ○ All Divorce Documents/All Divorce Decrees/All QDROS 	At least 90 days before your retirement date Example: If you are planning to retire on June 1 st , you need to submit these documents no later than March 1 st .

Once all above-referenced documents are received by the Fund Office, we will review your work history and calculate your benefit options. Then the Funds' actuaries will review your file. The Fund Office will contact you once the Election Form is finalized. This process takes approximately 6-8 weeks depending on how many files are in queue along with the complexity of the calculation.

STEP 3:

<u>WHAT</u>	<u>WHEN</u>
Review the options detailed in the Election Form. Initial next to the benefit option you choose, sign and date the last page of the document, and, if you are married, have your spouse do the same.	After submitting the Local 33 Pension Application. You may want to consult with your financial advisor before making your decision. Once you elect a benefit option and begin receiving the benefit, you may not change options. This is true even if you later divorce.

STEP 4:

<u>WHAT</u>	<u>WHEN</u>
Complete the remaining forms in the packet and submit them to the Fund Office	At least 3 weeks before your retirement date

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