

Carpenters Retirement Plan of Western Washington

Carpenters of Western Washington Individual Account Pension Plan

Enrollment Form

To properly enroll in the Carpenters Retirement Plan and Carpenters Individual Account Pension Plan, you must complete this form in its entirety and return it to Carpenters Trusts of Western Washington in Seattle. The address is on the reverse side of this form.

Section 1 – Participant Information

	Last Name	First Name	MI	Social Security Number	Date of Birth
Participant's Name					

Section 2 – Carpenters Retirement Plan of Western Washington

The Carpenters Retirement Plan of Western Washington is one of two pension plans provided as part of most fringe benefit packages. List the name of the person (the beneficiary) who should receive your vested benefits if you die before you retire under this plan. If you are married, you must list your spouse.

Beneficiary Name		Gender (M-F)		Social Security Number	
Mailing Address		Date of Birth		Mobile Number	
City, State, Zip		Relationship		Email	

Section 3 – Carpenters of Western Washington Individual Account Pension Plan

The Carpenters of Western Washington Individual Account Pension Plan is one of two pension plans provided as part of most fringe benefit packages. List the name of the person (the beneficiary) who should receive your vested benefits if you die before you retire under this plan. If you are married, you must list your spouse.

Beneficiary Name		Gender (M-F)		Social Security Number	
Mailing Address		Date of Birth		Mobile Number	
City, State, Zip		Relationship		Email	

Section 4 – Participant's Signature

Please sign and date this form. The Trust Office cannot process this form without your signature.

Participant's Signature

Date

Enrollment Form Instructions Are On the Reverse Side of This Form

Enrollment Form Instructions

Section 1 – Participant Information. Please provide all information requested in this section.

Section 2 – Carpenters Retirement Plan of Western Washington. List the name of the person (the beneficiary) who should receive your vested benefits if you die before you retire under this plan. Your spouse is the beneficiary of your preretirement death benefit under the Carpenters Retirement Plan, even if you designate a nonspouse beneficiary. If you are not married, you may designate any person (or persons) as your beneficiary. However, if you have a minor child or children and they qualify for the Primary Spouse's Benefit, your minor child or children will be the beneficiary of your preretirement death benefit, even if you designate a nonchild beneficiary. A minor child is a child under age 18, or under age 21 if a full-time student. If there is no valid beneficiary designation on file, but you are survived by a lawful spouse or by any children, whether natural, adopted, or stepchildren, then the Trustees, in their discretion, may deem the surviving spouse or children as the beneficiaries.

Section 3 – Carpenters of Western Washington Individual Account Pension Plan. List the name of the person (the beneficiary) who should receive your vested benefits if you die before you retire under this plan. Your spouse is automatically the beneficiary of your preretirement death benefits under the Carpenters Individual Account Pension Plan, even if you designate a nonspouse beneficiary. If you are not married, you may designate any person (or persons) as your beneficiary. If there is no valid beneficiary designation on file, but you are survived by a lawful spouse or by any children, whether natural, adopted, or stepchildren, then the Trustees, in their discretion, may deem the surviving spouse or children as the beneficiaries. If there is no surviving spouse or child, then the Trustees will pay the benefit to the personal representative of your estate, or may, in their discretion, pay your burial expenses with all or a portion of the benefits.

Section 4 – Participant's Signature. Please sign and date this form. The Trust Office cannot process this form without your (the participant's) signature.

Carpenters Trusts of Western Washington

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