

# AGC-International Union of Operating Engineers Local 701 Trust Funds

15 - 82<sup>nd</sup> Drive, Suite 110 • Gladstone, Oregon 97027  
Phone (866) 697-5750 or (503) 657-9740 • Fax (503) 657-9737 • Website www.agc-iuoe701trusts.com

Administered by  
Welfare & Pension Administration Service, Inc.

## DEFINED BENEFIT PENSION PLAN

### APPLICATION FOR RETURN TO RETIREMENT

#### **Please Fill in All Spaces Below**

NAME: \_\_\_\_\_ AGE: \_\_\_\_\_

WPAS ID# \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

DATE RETURNED TO WORK: \_\_\_\_\_

EMPLOYER'S NAME: \_\_\_\_\_

WORK LOCATION (city and state): \_\_\_\_\_

TYPE OF WORK: \_\_\_\_\_ DATE LAST WORKED \_\_\_\_\_

Your benefits may have been previously suspended in accordance with the following rules:

#### **Benefits Earned Before January 1, 2004**

You were permitted to work 300 hours in a year before the suspension rules apply to the part of your benefit you earned before January 1, 2004. Starting the month after the month you reached 300 or more hours, and for the rest of the year, you did not receive benefit payments for any month in which you worked 40 or more hours.

#### **Benefits Earned After December 31, 2003**

With respect to the part of your benefit you earned after December 31, 2003, your benefit was suspended in the earlier of the following months:

1. The month after the month in which you earned 300 hours of post-retirement service, provided that such employment is solely covered hours of employment under the Plan; or
2. The first month in which you earned 40 hours of post-retirement service, if at least one of your post-retirement hours in that or a prior month is not earned in covered hours of employment but otherwise satisfies the definition of post-retirement service.

In both cases, you would not receive benefit payments for any month in which you work 40 or more hours in the rest of the year.

#### **Missed Payments**

If you can prove that you worked fewer than 40 hours in a calendar month or 40 hours in a four or five week pay period ending in a calendar month, if that is how your employment maintains records, for which your benefits were suspended, you will receive retroactive benefits for that month. **You should submit copies of pay stubs or other evidence of hours worked.** (If your employer does not maintain hourly work records, you will need to prove you worked fewer than eight days or eight shifts.)

## **Overpayments**

I understand that if I received benefits for any months that my benefit should have been suspended under the above rules, my benefits will be withheld until I have repaid such benefits to a maximum of three months. If more than three months' benefits were paid to me during months that payments should have been suspended, my monthly benefit will be reduced by 25% until the balance has been repaid.

## **Additional Benefits Earned**

Your retirement benefit will be adjusted to reflect any additional pension you earned by working 500 or more covered hours of employment in a calendar year, beginning with checks received in the following calendar year. If you initially retired before Normal Retirement Age or if your marital status has changed since you commenced benefits, you may elect a form of payment with respect to the additional pension. Otherwise, the benefit option you chose when you first commenced payments will apply to the additional pension.

**I UNDERSTAND THAT I MUST NOTIFY THE TRUST OFFICE WHENEVER I RETURN TO WORK**

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

Return this form to:      AGC-IUOE LOCAL 701 Pension Trust Fund  
                                    Clackamas River Plaza  
                                    15-82<sup>nd</sup> Drive, Suite 110  
                                    Gladstone, OR 97027