

New England Teamsters & Trucking Industry Pension Fund

1 Wall Street Burlington MA 01803-4768 • Phone (800)447-7709 • Fax (781) 345-4402

Pension Process Checklist

Please use the checklist below as a guide to preparing for the pension application process and as always please be assured we are here to help in any capacity necessary.

A completed application must be received in the Fund Office at least **one full calendar month** in advance of your pension commencement date.

Options for Help:

Visit the Pension Fund in person at:

New England Teamsters Pension Fund

1 Wall Street, 4th floor

Burlington, MA 01803-4768

Office Hours: Monday – Friday 8:00 AM to 4:00 PM, closed on Federal holidays

Appointments Not Required.

Contact us by Phone at:

781-345-4400 (Main Number)

800-447-7709 (Non Retired Members)

877-638-3899 (Retired Members)

Contact the Pension Fund by mail at:

New England Teamsters Pension Fund

1 Wall Street, 4th floor

Burlington, MA 01803-4768

Email Us at:

contactus@nettipf.com

Call Your Local Union:

Set up an appointment for our Field Representative to assist you there.

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Documents Checklist for Pension Benefit Application <i>(Required unless noted)</i>	
Single Life Pension Lifetime benefit to applicant only	Husband & Wife Pension Lifetime benefit to the applicant and then to the applicant's surviving spouse
<input type="checkbox"/> Pension Benefit Application	<input type="checkbox"/> Pension Benefit Application
<input type="checkbox"/> Proof of Applicant Birth	<input type="checkbox"/> Proof of Applicant Birth
<input type="checkbox"/> Authorization to Obtain Earnings Data From SSA	<input type="checkbox"/> Proof of Spouse Birth
<input type="checkbox"/> Electronic Deposit Form	<input type="checkbox"/> Proof of Marriage
<input type="checkbox"/> Federal Tax Withholding	<input type="checkbox"/> Authorization to Obtain Earnings Data From SSA
<input type="checkbox"/> ¹ Massachusetts State Tax Withholding	<input type="checkbox"/> Electronic Deposit Form
<input type="checkbox"/> ² Employment After Retirement Reporting	<input type="checkbox"/> Federal Tax Withholding
<input type="checkbox"/> ³ Husband & Wife Rejection Form	<input type="checkbox"/> ¹ Massachusetts State Tax Withholding
<input type="checkbox"/> ⁴ Social Security Disability Award Letter	<input type="checkbox"/> ² Employment After Retirement Reporting
	<input type="checkbox"/> ⁴ Social Security Disability Award Letter

Acceptable proof of birth documents: birth or baptismal certificate, foreign government or church record (with English translation), Social Security Award if date of birth is shown, naturalization record, military record, current valid passport or certified school record.

We recommend that you file an application 3 to 6 months prior to your intended retirement date. This will help us meet our goal of issuing your first pension check in the same month as your pension commencement date. Failure to return all of the necessary forms may result in a delay in the processing of your claim for benefits.

Once the Fund Office completes the processing of your application and determines that you are entitled to a pension benefit, you will receive a formal approval letter which specifies the amount and form of your monthly pension. After receiving your approval letter, you may change any of your elections within 90 days by notifying the Fund Office in writing.

All benefits payable by the Fund are considered as **taxable income** and must be reported on your federal and state, if applicable, tax returns. Every January, the Fund Office will send you a Form 1099-R reporting all benefit payments made to you during the prior calendar year. This same information is also filed with the Internal Revenue Service. If you do not return your tax withholding form(s) with your application, we will mail the applicable tax forms with your approval letter.

¹ If you want the Pension Fund to withhold Massachusetts State Tax from your pension amount, the Pension Fund can only withhold for the Commonwealth of MA.

² If you intend to work in any employment after retirement and you are under the age of 70.

³ If you are married and select the Single Life Annuity, you and your spouse must sign the H&W Rejection Form before a Notary Public.

⁴ If you are applying for a Disability Pension.

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Your monthly pension will be electronically deposited directly into your checking or savings account on the **first business day of every month**. Please fill out and return an electronic deposit form with your application. Since the processing time takes between 1 to 2 months, you may receive your first couple of pension checks in the mail.

In compliance with the requirements of the Pension Fund, future pension benefits will be suspended if it is determined that you are working in Disqualifying Employment for more than 80 hours per month. With the exception of the Disability Pension, the current rules of the Pension Fund allow you to work up to 80 hours per month after your retirement for any employer in any type of work and still receive your pension benefit for that month. If you intend to continue working after your retirement, you must complete an Employment after Retirement form. A pensioner age 70 and over may work in any capacity without limitation or restriction and remain eligible to receive his pension benefit.

Social Security Benefits paid by the Social Security Administration are independent of any benefits paid by this Pension Fund. If you are entitled to receive benefits from the Social Security Administration, you should file for those benefits separately from your application to this Pension Fund.