

# New England Teamsters & Trucking Industry Pension Fund

1 Wall Street, 4<sup>th</sup> Floor • Burlington MA 01803-4768 • Phone (800)447-7709 • Fax (781) 345-4402

## EMPLOYMENT AFTER RETIREMENT REPORTING FORM

Applicant's Name: \_\_\_\_\_ S.S. # \_\_\_\_\_

Address: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

As a pensioner or future pensioner under age 70, I am hereby notifying the Fund Office of my intention to continue working after my pension commencement date. If I have already received pension benefits, I understand that this notice is to be filed with the Fund within fifteen (15) days after starting any type of work, without regard to the number of hours worked. If timely filed, this notice will preserve my entitlement to receive pension benefits until a determination is made regarding my employment. IT IS RECOMMENDED THAT YOU INCLUDE WITH THIS FORM A JOB DESCRIPTION COMPLETED BY A COMPANY OFFICIAL.

In accordance with Section 11.01 (d) (ii) of the Rules and Regulations, I am hereby requesting a determination whether the type of work described below is considered Disqualifying Employment or Non-Disqualifying Employment (see reverse side):

Name and Address Employer: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

My Job Classification or Title: \_\_\_\_\_

Job Description and Duties Performed \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Starting date of my employment was/will be \_\_\_\_\_

Number of hours worked or plan to work each month \_\_\_\_\_

I understand that I may work in any type of employment after my pension commencement date for up to 80 hours per month beginning October 1, 2015 and still be entitled to my monthly pension. By complying with the notification requirements of the Plan, I understand that future pension benefits will be suspended if it is determined that I am working in Disqualifying Employment for more than the allowable amount of hours. Once suspended, the Trustees have the right to withhold future benefit payments until I submit satisfactory evidence to the Fund Office that I am no longer engaged in Disqualifying Employment.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Disqualifying Employment is any type of work, whether union or non-union, for more than the allowable amount of hours per month that is similar to the type of work that the participant was previously engaged in, as well as any other type of work that is covered by the Plan for which contributions are required to be made to the Fund. The major types of work or industries covered by this Plan are freight, construction, warehousing and distribution, food, fuel, moving and storage, and delivery services. The Plan does not use a post- retirement dollar limitation.

In accordance with Section 11.01 of the Rules and Regulations, all pensioners under the age of 70 must notify the Trustees in writing within fifteen days after starting any work, without regard to the number of hours worked each month. In addition to this notification, it is recommended that you include a job description completed by a company official. Upon receipt of this information a determination will be made whether your employment is Disqualifying Employment or not. If it is determined that your employment is considered Disqualifying Employment, you would not be entitled to pension benefits for any month in which you were employed for more than the allowable amount of hours per month. **EMPLOYMENT WITH ANY EMPLOYER IN ANY TYPE OF WORK, INCLUDING COVERED EMPLOYMENT, FOR LESS THAN THE ALLOWABLE AMOUNT OF HOURS IN ANY MONTH WILL NOT BE CONSIDERED DISQUALIFYING EMPLOYMENT.**

## FOR PENSIONERS UNDER AGE 70

A pensioner under the age of 70 is not entitled to pension benefits for any month in which he is working in Disqualifying Employment. Disqualifying Employment as described in Section 1.15 of the Rules and Regulations means employment or self-employment that is:

- (a) in an industry covered by the Plan when the Participant's pension payments began,
- (b) in the geographic area covered by the Plan when the Participant's pension payments began, and
- (c) in any type of work in which the Participant was employed in Covered Employment at anytime, as well as any type of work for which contributions are required to be made to the Pension Fund.

## FOR PENSIONERS AGE 70 AND OLDER

A pensioner age 70 and over may work in any capacity without limitation or restriction and remain eligible to receive his pension benefit. In addition, once a pensioner reaches age 70, he is no longer required to notify the Fund of his employment.