

Carpenters Retirement Plan of Western Washington

Carpenters of Western Washington Individual Account Pension Plan

Enrollment Application

Complete this application in its entirety and return it to Carpenters Trusts of Western Washington. The mailing address is on the back of this application.

Section 1 – Participant Information

Please provide your legal name as it appears on your Social Security card or on your U.S. Individual Income Tax Return.

Legal Last Name	First Name	MI	Date of Birth	Social Security Number

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.

Legal Last Name	First Name	MI	Relationship	Date of Birth	Social Security Number

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.

Legal Last Name	First Name	MI	Relationship	Date of Birth	Social Security Number

Section 4 – 401(k) Application

If you qualify and would like to apply for or change your 401(k) contribution amount to the Carpenters Individual Account Pension Plan, please complete this section. Carpenters Trusts will confirm receipt of your application by letter. Please notify your employer(s) of your 401(k) amount. Once you make a 401(k) election you can make two additional changes within the same calendar year. Please check the 401(k) amount you want withheld from your paychecks. Check one box only. 401(k) elective contributions are subject to the terms of the Carpenters of Western Washington Individual Account Pension Plan.

\$0/hour
 \$1/hour
 \$2/hour
 \$3/hour
 \$4/hour
 \$5/hour
 \$6/hour
 \$7/hour
 \$8/hour

Section 5 – Participant's Signature

Please sign and date this form. Carpenters Trusts cannot process this form without your signature.

Participant's Signature	Date
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Enrollment Application 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 – 401(k) Application. If you qualify and would like to apply for or change your 401(k) contribution amount to the Carpenters Individual Account Pension Plan, please complete this section. Carpenters Trusts will confirm receipt of your application by letter. Please notify your employer(s) of your 401(k) amount. Once you make a 401(k) election you can make two additional changes within the same calendar year. Please check the 401(k) amount you want withheld from your paychecks. Check one box only. 401(k) elective contributions are subject to the terms of the Carpenters of Western Washington Individual Account Pension Plan.

Section 5 – Participant's Signature. Please sign and date this form. Carpenters Trusts cannot process this form without your (the participant's) signature.

Carpenters Trusts of Western Washington

PO Box 1929

Seattle, WA 98111-1929

www.ctww.org

Telephone (800) 552-0635

Fax (206) 728-5648

Email ps@ctww.org