



# IAM NATIONAL PENSION FUND NATIONAL PENSION PLAN

## HOW TO APPLY FOR PENSION BENEFITS

### 1. REQUEST YOUR APPLICATION

**Phone**



**1-800-424-9608**  
ask for  
Customer  
Service

**Fax**



**202-457-8653**

**Email**



**pensions@iamnpf.org**

**Mail**



1300 Connecticut Ave NW  
Suite 300  
Washington DC  
20036

**Website**



**www.iamnpf.org**

### 2. BE PREPARED TO PROVIDE THE FOLLOWING INFORMATION WHEN REQUESTING YOUR APPLICATION

- NAME & ADDRESS
- DATE OF BIRTH
- SOCIAL SECURITY NUMBER
- IF MARRIED, SPOUSE'S NAME, DOB, & SSN
- INTENDED RETIREMENT DATE

**REMEMBER:** Your Application can be requested 180 days before your intended retirement date or last day of work. See the chart below which indicates when you should request a Pension Application, when the Application must be received in the Fund Office, and the date you must stop working.

#### WHEN TO APPLY FOR BENEFITS

Your Pension Effective Date is the first of the month following the later of your last day worked or the Fund's receipt of your completed application.

If you are retiring with a Pension Effective Date of:	Request an Application as early as:	Application must be received in Fund Office by:	Stop working in Disqualifying Employment no later than:
May 1, 2015	November 1, 2014	April 30, 2015	April 30, 2015
June 1, 2015	December 1, 2014	May 30, 2015	May 31, 2015
July 1, 2015	January 1, 2015	June 30, 2015	June 30, 2015
August 1, 2015	February 1, 2015	July 31, 2015	July 31, 2015
September 1, 2015	March 1, 2015	August 31, 2015	August 31, 2015
October 1, 2015	April 1, 2015	September 30, 2015	September 30, 2015
November 1, 2015	May 1, 2015	October 31, 2015	October 31, 2015
December 1, 2015	June 1, 2015	November 30, 2015	November 30, 2015
January 1, 2016	July 1, 2015	December 31, 2015	December 31, 2015
February 1, 2016	August 1, 2015	January 30, 2016	January 31, 2016
March 1, 2016	September 1, 2015	February 29, 2016	February 29, 2016
April 1, 2016	October 1, 2015	March 31, 2016	March 31, 2016
May 1, 2016	November 1, 2015	April 30, 2016	April 30, 2016
June 1, 2016	December 1, 2015	May 31, 2016	May 31, 2016



IAM NATIONAL  
PENSION FUND  
*Better Pension • Better Life*

## The IAM National Pension Fund's Website Has Something for Everyone

[www.iamnnpf.org](http://www.iamnnpf.org)

### PARTICIPANTS CAN:

- See individualized information about themselves
- Update their Address
- Calculate estimates of their pension benefits online
- Complete online Pension Application
- View hours that have been reported by their employer
- Download and print various forms
- View the Summary Plan Description
- Learn the latest news regarding the National Pension Plan
- View Rate Chart
- Designate beneficiaries

### EMPLOYERS CAN:

- Learn how they and their employees can benefit by participating in the National Pension Plan
- Handle contribution reporting through the new E-Remit System
- View the Summary Plan Description
- View Annual Funding Notice
- View Trust Agreement
- Obtain National Pension Plan and 401(k) Plan Standard Contract language

### UNION REPRESENTATIVES CAN:

- Learn Pension Negotiating Basics
- Obtain Standard Contract language (National Pension Plan and 401(k))
- View the Summary Plan Description
- Learn the latest news regarding the National Pension Plan
- View Rate Chart

### BENEFIT RECIPIENTS CAN:

- Verify their monthly pension payment information
- Submit Direct Deposit Request online
- View and download their 1099-R information
- View and update their W-4P form

### NON-PARTICIPANTS CAN:

- Model Potential Pension Benefits
- View Summary Plan Description
- Learn the latest news regarding the National Pension Plan