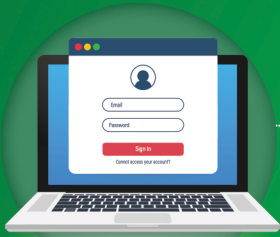


# PENSION APPLICATION BENEFITS GUIDE

## HOW TO REQUEST A PENSION APPLICATION

CHOOSE **ONE** OF THE FOLLOWING OPTIONS:



### GO ONLINE

Go to the IAMNPF Online Pension Application website:  
[www.iamnpf.org](http://www.iamnpf.org)



### CALL

Call Customer Service at 1-800-424-9608 to Request a Paper Application



### EMAIL

Retrieve the Request for Application Form from the IAMNPF website and email to [contact@iamnpf.org](mailto:contact@iamnpf.org)

## RETIRING IN 2021?

A participant **must submit a formal Pension Application** to receive benefits from the IAM National Pension Fund (IAMNPF).

If you are planning to retire in 2021 and apply for pension benefits, we strongly encourage you to submit your application as early as **180 days before your intended pension effective date.**

## WORKING INTO DECEMBER 2021?

If you are covered under **the Preferred Schedule of the Rehabilitation Plan** and desire to work into December 2021, please note the following:

01

Your completed Pension Application must be received in the Fund Office **no later than December 30, 2021.** **Note:** The postmark date **does not** qualify.

02

Your Pension Application should include **all required forms and supporting documents.** Please reference the complete list of documents on the reverse side of this flyer.

## CONTACT US!

Have a Question about the Online Pension Application or Rehabilitation Plan, Please Contact Customer Service at:

**1-800-424-9608 | Fax: 202-471-2547 | 9 a.m. - 7 p.m. EST | Se Habla Español**  
**IAM National Pension Fund | 99 M Street, SE, Suite 600 | Washington DC 20003**



## LEGAL DISCLAIMER

The IAM National Pension Fund Pension Application Benefits Guide ("Guide") is a publication from the IAM National Benefit Funds Office. The information in the Guide is intended to highlight certain information about your benefits and is provided for general informational and educational purposes only. The Guide is not a substitute for official Plan Documents. The text of the Plan itself, as interpreted by the Boards of Trustees, represents the final authority in all cases.



## PREFERRED SCHEDULE

Learn More About the Preferred Schedule under the IAMNPF Rehabilitation Plan



### STEP 1



#### TO DETERMINE YOUR PENSION EFFECTIVE DATE

Log-in IAMNPF's Secure System, via IPASS: <https://ipass.iamnfp.org/>  
To determine your pension effective date, review the chart on: <https://www.iamnfp.org/participants/apply-pension-benefits>

### STEP 2



#### CLICK

Click on Rehabilitation Plan Information to access the Plan Documents and Summary Plan Description

### STEP 3



#### WATCH

Watch Short Videos from the Executive Director

### STEP 4



#### READ

Read the Rehabilitation Plan Documents and Summary Plan Description

## APPLICATION CHECKLIST



In addition to the Pension Application, participants must submit supporting documentation.

Please upload supporting documents online. You may also mail or fax legible **copies** of all documents needed to complete your Application, **Do NOT** send the original documents.

We cannot guarantee the return of original documents.

- 1 **Proof of Age (One of the Following is Required):**  
\*Valid Driver's License or Non-Driver's License, Passport, Birth Certificate
- 2 **Marriage Certificate (if married)**
- 3 **Disability Award (if applicable)**
- 4 **Divorce Decree (if applicable)**
- 5 **Spouse's Birth Certificate (if married)**
- 6 **Request For Ruling On Post-Retirement Employment (if applicable)**
- 7 **Direct Deposit Form (with voided check or letter from financial institution)**
- 8 **Retroactive Annuity Starting Date Form (RASD)**

\*If you are unable to provide any proof of age documents from the Primary Proof of Age list, you **must** submit **two** documents from the Secondary Proof of Age list, which can be found at: [www.iamnfp.org](http://www.iamnfp.org)



## MAIL TIPS

The United States Postal Service is currently experiencing delays in mail deliveries, therefore, you may experience delays in sending and receiving information to and from the IAM National Benefit Funds Office (BFO). However, rest assured, the BFO is taking proactive measures to ensure all mail once received is processed quickly within the BFO.

- Please submit all documents at one-time. Using certified mail will allow you to know when they were delivered to the BFO.
- Advise the BFO of address and/or email changes. Applying online will allow you to upload your documents digitally and receive communications from the Fund electronically. Your application and documents should be mailed to the address on the previous page.