



Sheet Metal Workers' National Pension Fund PRE-RETIREMENT DEATH BENEFIT DESIGNATION OF BENEFICIARY (IES)

I hereby designate the following person(s) as my beneficiary to receive a lump sum Death Benefit if any, payable at my death under the Rules and Regulations of the SHEET METAL WORKERS National Pension Plan.

Name of Beneficiary (ies): _____

Relationship: _____ Social Security Number: _____
of Beneficiary – (Required)

Address of Beneficiary (ies): _____ Street _____ City _____ State _____

Date of Birth of Beneficiary _____

If additional space is needed, please use the back of this form and indicate if a Primary or Contingent Beneficiary.

In addition, I hereby designate the following person(s) as my Contingent Beneficiary (ies) in case my above-named Beneficiary (ies) does not survive me.

Name(s) of Contingent Beneficiary (ies): _____

Relationship: _____ Social Security Number: _____
of Beneficiary – (Required)

Address of Beneficiary (ies): _____ Street _____ City _____ State _____

Date of Birth of Beneficiary _____

If additional space is needed, please use the back of this form and indicate if a Primary or Contingent Beneficiary.

I understand that I may change this Designation of Beneficiary (ies) at any time on a form supplied by the Trustees for that purpose.

Participant Name: _____

Participant Social Security Number: _____ Date of Birth: _____

Signature of Participant: _____ Date: _____

Signature of Witness: _____ Date: _____

Please read important information regarding this benefit on back of the form.
This form is only valid if it is on file with your LOCAL UNION OFFICE.

Information About the Lump Sum Death Benefit

A Lump Sum Death Benefit will be paid to your designated beneficiary if:

- You worked 435-hours of Work in Covered Employment within the 24-month period before your death, or you have accumulated at least 60 months of Future Service Pension Credit, and
- You die before receiving your pension, and
- No Pre-Retirement Surviving Spouse Annuity is payable.

The Lump Sum Death Benefit is equal to 50% of the Employer contributions that have been paid to the Fund on your behalf.

It is important to note the Plan does not use Pension Credit that was lost due to a Permanent Break in Service to determine the amount of the Lump Sum Death Benefit. Additionally, a Lump Sum Benefit may be *forfeited* if you work in Non-Signatory Employment on or after September 1, 1988.

IMPORTANT

You must complete the Fund's Designation of Beneficiary form in order for your designated beneficiary to receive this benefit under the Plan. You should carefully complete this card and file it with your Local Union. The Fund **will not** recognize any designation other than those listed on **our card**. It is for this reason that it is important to periodically check with your local union to insure your Designation of Beneficiary form reflects your most current wishes.

If you have any questions regarding this benefit
contact the Fund office at 1-800-231-4622.