

# Idaho Operating Engineers – Employers Pension Trust Fund

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Administered by  
Welfare & Pension Administration Service, Inc.

## APPLICATION FOR NORMAL OR EARLY RETIREMENT BENEFITS

1. Please read each question carefully.
2. Print or type all information.
3. Be sure to answer all applicable questions to avoid delay in processing your application.
4. Attach additional sheets if you need more space to answer any questions.
5. BE SURE TO SIGN AND DATE THIS APPLICATION.
6. Mail the completed application and proof of age and marriage, if applicable, to the above address.

1. Name: \_\_\_\_\_  
Last First Middle

2. Previous Name: (If any) \_\_\_\_\_ Date of Name Change: \_\_\_\_\_

3. Social Security #: \_\_\_\_\_ Phone #: (\_\_\_\_) \_\_\_\_\_ E-Mail Address \_\_\_\_\_

4. Mailing Address: \_\_\_\_\_  
Street number City State Zip

5. Local Union #: \_\_\_\_\_ Male ☐ Female ☐ Birthdate: \_\_\_\_\_

6. Marital Status: Married ☐ Separated ☐ Divorced ☐ Widowed ☐ Single ☐

Were you ever divorced? YES ☐ NO ☐ Date of Separation or Divorce\*: \_\_\_\_\_

\*If your marriage was dissolved after December 31, 1984, your election of benefits may be subject to the rights of a prior spouse and you are required to attach a complete FILED copy of your dissolution decree and property settlement agreement and/or Qualified Domestic Relations Order(s). The copies must show the document was FILED with the court and signed by the judge.

If currently married, please enter spouse's information:

7. Spouse's Name: \_\_\_\_\_  
Last First Middle

8. Spouse's Social Security #: \_\_\_\_\_ Spouse's Birthdate: \_\_\_\_\_

I hereby revoke all former pension beneficiary designations, if any, and name the following person as my beneficiary for monthly pension benefits and, if I am eligible, the burial benefit provided for in the Plan.

If not married, Name of Beneficiary:

9. Beneficiary Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_

10. Social Security #: \_\_\_\_\_ Sex: Male ☐ Female ☐ Relationship: \_\_\_\_\_

11. Beneficiary Address: \_\_\_\_\_  
Street number City State Zip

12. In accordance with the terms of the Idaho Operating Engineers and Employers Pension Trust Fund I hereby apply for:

Normal Retirement Benefit ☐  
(Age 62 or Older)

Early Retirement Benefit ☐  
(Age 55 – 62) (Benefits are reduced for Early Retirement under age 61)

**\*If you are applying for Disability Benefits you must use a Disability Retirement application form\***

## Idaho Operating Engineers and Employers Pension Trust Fund

13. Name of Current or Most Recent Employer: \_\_\_\_\_

14. The last day I worked was or will be on: \_\_\_\_\_  
Month Day Year

15. I hereby request that my retirement be effective on the first day of \_\_\_\_\_  
Month Year

16. If determined to be eligible, I am interested in enrolling in the Trust's Retiree Medical Plan. I understand a monthly premium must be paid. YES ☐ NO ☐

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### PLEASE READ CAREFULLY

I understand and agree that it is my responsibility to submit any and all information needed to establish my eligibility for retirement under this Trust and that this application can be canceled by written request submitted to the Trust Office prior to its Effective Date. I certify that the information on this form is true and accurate to the best of my knowledge.

I understand the conditions of my retirement are governed by the Plan rules and regulations.

I understand that in the case of an overpayment of my pension benefits, the Trustees are entitled to recover any amounts overpaid to me.

If no information appears under the Spouse's Section above, I certify that I am not married.

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date

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### AGE VERIFICATION

**IMPORTANT: A copy of your birth certificate and your spouse's birth certificates along with proof of your marriage is required to process your request.**

**If the name on either your birth certificate or your spouse's birth certificate is different from your present names, you must also submit a copy of the court order, marriage certificate, affidavit, or other document to show the name change(s).**

If you are unable to obtain a copy of either your or your spouse's birth certificates, you must submit **TWO** of the following documents. These documents must show your birthdate.

Baptismal Certificate Showing Birthdate (regardless of when it was recorded)  
Citizenship or Naturalization Papers  
Records or information obtained from the U.S. Census Department  
Life Insurance policies taken out at least 10 years prior to your date of retirement  
Social Security Information including birthdate  
U.S. Armed Forces Records  
School Records established prior to your 21<sup>st</sup> birthday and showing birthdate  
Passport  
Drivers License with Photograph  
Marriage Records showing Birthdate  
Family Bible Entries  
Affidavit of Birth

# Idaho Operating Engineers and Employers Pension Trust Fund

## UNION MEMBERSHIP HISTORY

Name: \_\_\_\_\_ Social Security # \_\_\_\_\_

Please list all Union Membership beginning with your most recent or current Local and working backward to your Initiation Date. Be sure to include time spent in the military.

Have you ever worked in Northern Idaho (North of Grangeville, Idaho) or Eastern Washington?

YES ☐ NO ☐ If Yes, when \_\_\_\_\_

**If you have worked within the jurisdiction of other Operating Engineers Locals, please include that information below:**

Please print or type the following information:

Local Union #	City & State	From		To	
		Month	Year	Month	Year