

Central Pennsylvania Teamsters Pension Fund

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TOLL FREE IN PA: 1-800-343-0136

TOLL FREE IN USA: 1-800-331-0420

FAX: 610-320-9239

CHECKLIST FOR COMPLETION OF BENEFICIARY FORMS

1. Did you complete Part A, Participant's information, listing your name, social security number, address and Employer?
2. After completing your beneficiary information under Part B, did you sign, date, enter your telephone number and email address on the bottom of Part B? If you are naming your spouse as primary beneficiary, the information must be completed.
3. Did you complete and sign Part C?
4. If under Part C you checked the box stating "I am not lawfully married (includes single, widowed and legally divorced)", did you must submit a photocopy of your divorce decree along with the completed beneficiary form?
5. If you named someone other than or in addition to your spouse as your primary beneficiary, under Part B, did you have your spouse complete and sign Part D and have this section notarized? * If you named only your spouse as your primary beneficiary under Part B, you **DO NOT** have to complete Part D.
6. You must sign your name consistently on Part B and Part C.

***the date of notarization must be the same as the date your spouse signs the beneficiary form.**

If you have any problems or questions regarding the completion of this form, please contact the Pension Fund Office. In Pennsylvania dial 610-320-5505 or toll free at 1-800-343-0136. If you live outside of the state of Pennsylvania, our nationwide toll free number is 1-800-331-0420.

EXPLANATION OF PRIMARY OR SECONDARY BENEFICIARY

Please indicate the name(s) of your Primary Beneficiary(ies); if you wish, please indicate the name(s) of your Secondary Beneficiary(ies). If you are married, please list your spouse as your Primary Beneficiary. You may name someone other than your spouse or someone in addition to your spouse as your Primary Beneficiary(ies) if your spouse consents by completing Part D.

Benefits payable under the Central Pennsylvania Teamsters Defined Benefit Plan and Retirement Income Plan 1987 as a result of your death will be paid to your Primary Beneficiary. If your Primary Beneficiary dies before you, then your remaining Primary Beneficiary, if any, will receive the remaining benefit; if no Primary Beneficiary survives you, your Secondary Beneficiary will receive the remaining benefit. Benefits will be paid in equal shares to the Primary Beneficiary (or Secondary Beneficiary) unless you designate otherwise on this form. If no beneficiary is designated or if none survive you, payments will be made in accordance with the plan documents.