



CALIFORNIA FIELD IRONWORKERS TRUST FUNDS

Pension Trust • Welfare Plan • Vacation Trust
Apprenticeship Training & Journeyman
Retraining Fund • Annuity Trust

RETIREE WORK APPLICATION

1. I hereby make application to continue to receive my pension while I work for:

Name of Signatory Contractor or Governmental Agency

Company Address City State Zip

2. The effective date of my Pension with the California Ironworkers Field Pension Trust was _____.

3. My birthday is _____

4. I plan to commence work for the above named Employer on: _____ (insert date).

5. I will be working in the position checked below:

Inspector Detailer Estimator Safety Officer Sales / Clerical

6. My duties will be as follows:

7. **You must include along with this application, verification from your perspective employer of both your title and job duties as applicable to the employment for which you are applying to be approved to perform on this application.**

This employer attestation must be on company letterhead and must be signed by an employer representative.

NOTE: YOUR APPLICATION WILL NOT BE PROCESSED WITHOUT THIS DOCUMENTATION.

8. If you are under age 65 and will be working for an Employer that contributes to this Trust, please check the box that applies to you:

I have not been employed in any capacity or performed services for any Employer who contributes to the Trust for a period of at least 6 consecutive months after the effective date of my pension;

I have had a severance from employment, even though I have not had the 6-month "termination" period described in (a) above.



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If you checked box (b), please describe the facts that show that you have had a severance from employment. You may submit records, information, documents or other evidence to demonstrate that you have had a severance. You may, for example, submit statements from yourself, your employer, co-workers, or others. Please see the instructions for more information.

I understand that while I am employed, I will not be eligible for Retiree Welfare Coverage. I may be eligible for Active Health and Welfare Coverage if my employer agrees to pay the current Health and Welfare contribution rate for 175 hours per month (*further information will be provided upon approval of this application*). **I further understand that should I perform any duties not declared above, my pension will be suspended one month for each month in which I work any hours in prohibited employment. I also understand that if my duties and/or employer changes for any reason, a new Retiree Work Application must be completed and approved or my pension will be suspended.**

Member Signature Date

Trust Fund Office Member ID or Social Security Number

Trust Office Use Only

Pension Type: _____ Pens Eff Date: _____ Pension Credits: _____ Current Age: _____

Last Month for which hours were reported: _____ Last Employer: _____

Name of Requested Employer: _____ Signatory Yes No

Employer Attestation Provided: Yes No N/A (out of industry or apprenticeship instructors)

Decision: Approved Denied Out of Industry Apprenticeship

If BOT of Trustees Review is Required:

BOT Mtg Date: _____ Approved Denied Additional Info Requested



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Instructions for Working Retiree Rule

Usually, before normal retirement age, any employment in the building and construction industry is considered prohibited employment for which your pension will be suspended.

Limited exemptions to the suspension rule may be granted to individual retirees for work in specific jobs. Any such work must be **specifically approved in advance** by the Board of Trustees, and the Board of Trustees has discretionary authority to determine whether a retiree meets the requirements for the exemption. This exemption is not available to retirees who have attained normal retirement age (generally age 65). Retirees who begin working in the building and construction industry before submitting their Retiree Work Application will have their pension suspended for periods of work before their application was received, even if the application is later approved. To be approved, you must fulfill all of the following conditions:

- be age 45 or older and have earned at least 15 pension credits under this Plan; and
- submit your request for approval to work under this provision after your Annuity Starting Date; and
- the employment must be for an Employer bound to make contributions to the Trust or as an Inspector for a Governmental Agency that does not make contributions to the Trust; and
- the work to be performed is as a detailer, estimator, sales person, clerical staff, safety officer or as an Inspector for a Governmental Agency; and
- meet one of the following conditions:
 - (1) be age 62 or older (but younger than age 65); or
 - (2) work as an Inspector for a Governmental Agency that does not contribute to the Plan; or
 - (3) have not been employed in any capacity or performed services (whether as an employee, independent contractor, owner, or in any other capacity) for any Employer who contributes to the Plan for a period of at least 6 consecutive months after your Annuity Starting Date; or
 - (4) provide proof, acceptable to the Board of Trustees, that you have had a severance from employment (see below for more information).
- The request for approval to work must be submitted after the Retiree's annuity starting date (applies to a retiree who is under age 62 and who is applying to work for an Employer that contributes to this Plan).
- For a disability pensioner who retired on a Disability Pension based on medical evidence prior to September 1, 1993, the physical requirements of the work does not negate the original medical findings qualifying you for a pension.

Proof of a Severance from Employment

In order to establish that you have had a severance from employment, without having had at least a 6-month termination period, you must establish that, when you retired, you terminated employment with your contributing Employer(s) and intended to withdraw completely from any employment or activity in the building and construction industry (i.e., you intended to "retire" from the building and construction industry). You will also have to demonstrate that you did not have any preexisting understanding or agreement that you would continue performing services for your contributing Employer after your retirement or that you would return to work for any contributing Employer after your retirement began.



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In doing so, you should address the following specific issues, and provide any other information and evidence relevant to your situation:

- Describe any change in circumstances, after your retirement, that explains why your retirement plans changed or why your Employer asked you to return to work.
- Are you returning to work for the Employer you worked for prior to retirement or a different contributing Employer?
- When did you apply for the new position (if applicable)?
- When were you offered the new position?

If you are an owner or officer of the Employer, your burden of establishing that you had a severance from employment is substantially more difficult because of your continuing connection to the Employer.

The determination of whether you have had an actual severance from employment will be made by the Board of Trustees, or a Committee thereof, based on the facts and circumstances available to it. The Board of Trustees, or a Committee thereof, has full authority and discretion to determine whether you meet the requirements for the exemption.

Please be advised that should your application be approved, this approval of employment is not valid past the date you reach age 65. At that time, the Plan rules and regulations provide that you cannot work more than 40 hours per month in the same industry, the same trade or craft and in the same geographic area (California, Arizona, Nevada) covered by the Plan. For more information concerning the Plan's suspension of benefits provisions that apply after age 65, please see your Summary Plan Description. Should your employer choose to report 175 hours per month to continue your health and welfare benefits, this reporting must cease at age 65, as well.

The following working capacities are the **only** exceptions to that which has been outlined above:

1. A retiree approved to work in the Retiree Mentor Program has no restriction of hours, but the approval to work in said capacity is limited to one event and for a maximum period of nine (9) months, but not to exceed the program end date, which is currently 12/31/2020.
(Article VIII, Section 8(g); Amendment 7 to the Third Restatement of the Rules and Regulations of the Pension Plan for the California Ironworkers Field Pension Trust)
2. A retiree employed as an instructor for the California Field Ironworkers Apprenticeship Training and Journeyman Retraining Fund, for no more than 80 hours per month, and for instructors who qualify and are employed as Certified Welding Inspectors no more than 125 hours per month.
(Article VIII, Section 8(h); Amendment 6 to the Third Restatement of the Rules and Regulations of the Pension Plan for the California Ironworkers Field Pension Trust)



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ARTICLE VIII, SECTIONS 8(c) AND (d)

TO THE RESTATEMENT OF THE RULES AND REGULATIONS OF THE PENSION PLAN FOR THE CALIFORNIA IRONWORKERS FIELD PENSION TRUST (JUNE 1, 2001 RESTATEMENT)

EFFECTIVE JUNE 1, 2013

- (c) Limited exemption for work in the “building and construction industry” after retirement. Only upon advance job specific application and specific approval from the Board of Trustees, employment after retirement in Non-Covered Employment as described in paragraphs (2) and (3) of this subsection (c) will not be considered disqualifying for purposes of concurrently receiving pension benefits before Normal Retirement Age if the pensioner:
- (1) is at least age 45 and has earned at least 15 pension credits from this Plan; and
 - (2) is employed by an Employer bound to make contributions to this Trust under a Collective Bargaining Agreement (who has posted the applicable Union Surety Bond if based in California or Nevada) or is employed by a Governmental Agency not bound to make contributions to this Trust; and
 - (3) performs the work of a detailer, estimator, provided said jobs takes place principally in the Employer’s office, and not in the field, or sales person or clerical for said Employer, or as a safety officer for said Employer, or acts as an Inspector for a Governmental Agency; and
 - (4) submits his request for approval to work under this Section 8(c) after his Annuity Starting Date; provided, however, that this paragraph (4) does not apply to a pensioner who is age 62 or older or to a pensioner who will be working as an Inspector for a Governmental Agency that does not contribute to this Plan; and
 - (5) has had a severance from employment as defined in subsection (d), or is at least age 62, or will be working as an Inspector for a Governmental Agency that does not contribute to this Plan; and
 - (6) that in the case of a disability pensioner, who retired on a Disability Pension based on medical evidence prior to September 1, 1993, the physical requirements of such work does not negate the original medical findings qualifying such person for pension.

If all the conditions listed above are met, the Pensioner must agree that no welfare coverage will be offered from the date of such employment, that no further pension credits will accrue as a result of the work and that the Pensioner must re-certify his or her status annually in such method as may be directed by the Trustees. In addition to the annual recertification, a copy of the filed income tax form including W-2 information will be required. A letter requesting approval of continuing employment must be provided along with the recertification and tax information. Approval for employment is only for the job detailed in the letter of request and is only for the employer for which employment approval is requested. Any change in job duties or employer will require approval by the Board of Trustees. Additional information may be requested by the Board of Trustees to assure compliance with the provisions of this subsection. In the event the Employer is more than three months delinquent in fringe contributions to the Trust, any pension benefits payable in accordance with this subsection (c) shall be suspended. Such suspension shall commence on the first of the month following the date the Pensioner receives notification from the Plan that the exemption is no longer applicable and shall continue until the Pensioner stops prohibited employment or the Employer is no longer delinquent, whichever is earlier.

- (d) A pensioner will be considered to have a severance from employment if he has terminated employment with his Employer(s) and ceased the performance of services (whether as an employee, independent contractor, or in any other capacity) for all Employers who contribute to the Plan for a period of at least 6 consecutive months after his Annuity Starting Date or otherwise provides proof, acceptable to the Board of Trustees, that he has had a severance from employment.