

SHEET METAL WORKERS' LOCAL 36 401(k) FUND

**WAGE DEDUCTION FORM FOR VOLUNTARY CONTRIBUTIONS
For Initial Wage Deduction or for Changes in Wage Deduction**

Employee Name: _____ Phone # _____

Social Security Number: _____ Date of Birth: _____

Address: _____
Street City State Zip

Member of (Circle One) If you are not a member of the Union but an employee of a contributing contractor, please circle the area the contractor works.

Local 36 St. Louis Local 36 Columbia Local 36 Springfield

Local 218 - Springfield, IL Local 268 Local 36 Arkansas

Employer's Name: _____

My voluntary contribution is to be \$ _____ per hour beginning _____.

I would like to change my voluntary contribution to \$ _____ per hour beginning _____.

(Voluntary contributions will begin the first pay period of the following month after Benefits office has approved)

The minimum amount allowed for voluntary contributions to your Sheet Metal Workers' Local 36 401(k) Plan is \$0.10 per hour. (Keep maximum hourly amount below your net hourly take home rate)

Use this form to initiate, increase or discontinue your voluntary contribution. It must be delivered to the Fund Office.

Member's Signature _____ Date _____

NOTE TO EMPLOYERS

When this form is handed into your office, please fax a copy to the Fund Office at 314-652-0338 or email a copy to jkoontz@sheetmetal36.org.

The Benefits Office must approve and give you an effective date to begin withholding Voluntary contributions.

The Benefits office has approved voluntary contributions in the amount of _____ per hour to begin on the first payroll after _____.

Signed _____ Date _____

INSTRUCTION FOR COMPLETING THE FORM

Please carefully and **FULLY** complete the form. Use your current address. Don't omit your date of birth. If you are not a member of one of the participating Locals circle the local whose jurisdiction you are working in. Read the Summary Plan Description (SPD) for more information about Voluntary Contributions

Complete the amount you want deducted from your check and the applicable time period. Example: I would like my voluntary contribution to be \$2.00 per hour beginning May 1, 2012. Obviously, you want to set the amount so that it is clearly below your net hourly pay after tax and other deductions.

There is an IRS annual limit, currently \$18,000 on voluntary contributions. An additional \$6000.00 is allowed as a catch-up contribution if you are 50 years or older. See the SPD for more information on upper limits for wage deductions.

Use this form to start authorizing wage deductions as Voluntary Contributions to this 401(k) Plan.

Use this form to change the amount of your authorized wage deduction.

Use this form to stop (reduce to zero) your wage deduction previously authorized.

The form will be effective no earlier than the first payroll period after the form is delivered and approved by the benefits office.

If you change employers please send a new form to the Benefits Office; the Fund Office will promptly send a copy of this form to your new employer.

You can give the form directly to your employer and request that they forward a copy by fax or e mail to the Benefit Fund Office or send directly to the Benefits office.

If you have any questions or need additional information, please do not hesitate to contact our office at 314-652-8175 or 800-741-9411 or by email at jkoontz@sheetmetal36.org .