



Teamsters Pension Trust Fund

of Philadelphia and Vicinity

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TOLL-FREE (800) 523-2846 • FAX (856) 382-2401 • www.teamsterfunds.com

Union Trustees

William T. Hamilton
Howard H. Wells
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Employer Trustees

Daniel Schmidt
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Dear Member:

Enclosed is an initial application to apply for an Early or Normal Retirement benefit. This application does not guarantee benefits from the Fund, your eligibility to receive Retirement benefits will be reviewed once all information is received. Please read and follow the instructions listed below:

1. Answer all questions in the spaces provided.
2. Page 3 needs to have your signature notarized.
3. Please provide all copies (if applicable) of your birth certificate, your spouse's birth certificate, your marriage certificate, your social security card and your spouse's social security card. A baptismal certificate may be substituted for a birth certificate. *You may upload this information directly to our website at www.teamsterfunds.com. You must be a registered member to access this portal if you are not registered you can easily register when you open the webpage.*
4. Military Discharge papers (DD-214), only required if military service was served while in Covered Employment.

Your entire application and all requested documents must be returned before we can begin processing your retirement application. Most applications require 60 – 90 days to process. If we need to contact you regarding your application or if we require additional information, we will do so by mail.

If you should have any questions regarding this matter, please do not hesitate to contact the Pension Department at 1-800-523-2846 Option #2.

Sincerely,

Teamster Pension Trust Fund
of Philadelphia and Vicinity

Teamsters Pension Trust Fund of Philadelphia & Vicinity
Application for Normal or Early Retirement Benefits

Date: _____

Member/Spouse Information

Please read all questions carefully and print your answers

(1) Member's Name: _____
Last First Middle Initial

(2) Social Security #: _____ *Attach copy of Social Security Card*

(3) Member's Address: _____
_____ Member's Phone #: _____

(4) Member's Date of Birth: _____ *Attach copy of Birth Certificate*

(5) Intended Retirement Date: (Month/Day/Year) _____

(6) Type of Retirement you are applying for: Early ☐ Normal ☐ (check one box only)

(7) Marital Status: Single ☐ Married ☐ Divorced ☐ Widowed ☐ Separated ☐ (check one box only)

Note: If you are currently Divorced or Widowed, you must attach a full copy of your divorce decree with any property settlement agreement that might be attached or your spouse's death certificate.

(8) Spouse's Maiden Name: _____
Last First Middle Initial

If spouse's maiden name is different than indicated on the Marriage Certificate, please attach appropriate documents to substantiate each name change.

(9) Spouse's Social Security#: _____ *Attach copy of Social Security Card*

(10) Spouse's Date of Birth: (Month/Day/Year) _____ *Attach copy of Birth Certificate*

(11) Date of Marriage: (Month/Day/Year) _____ *Attach copy of Marriage Cert.*

Teamsters Membership

(List each period of membership beginning with the most recent.)

| Local Union # | City and State | Periods of Membership – FROM | TO |
|---------------|----------------|------------------------------|----|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Employment History

List all Employment, beginning with your most recent employer.

| Name and Address of Employer | Type of Work Performed | Periods of Employment From To |
|------------------------------|------------------------|---------------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

If you need additional space, please use the back of this page.

(12) Last Day of Work: _____

(13) Current Employer: _____

(14) Address and Telephone # of Current Employer: _____

(15) Number of hours you **currently** work each month: _____ Date you plan to terminate your
current employment: _____

(16) Have you ever been a member of the Local Union but were not working in Covered Employment, you were self-employed or not actively employed for any reason? _____

(17) If so, reason you were not in Covered Employment: _____

(18) Time period you were not in Covered Employment: _____

Military Service

(19) Have you ever served in the U.S. Military? _____

Dates of Service: To: _____ From: _____

Attach a copy of discharge or separation papers if time served was while you were in Covered Employment.

Record of Disability Benefits

(20) Have you ever received Weekly Disability Benefits?_____

(21) If so, when?(list all dates)_____

(22) Have you ever received Workmen's Compensation Benefits?_____

(23) If so, when?(*list all dates*)_____

If you need additional space, please use the back of this page.

I hereby apply for an Early/Normal Retirement Pension from the Teamsters Pension Trust Fund of Philadelphia and Vicinity. I, being duly sworn, attest that I have read and understand the foregoing statements and my answers and information therein contained and that the same are true and correct to the best of my knowledge and belief.

Member's Signature (Signature must be notarized or witnessed by a Plan representative) _____ Date _____

| | |
|-------------------------------|------|
| Fund Representative (witness) | Date |
|-------------------------------|------|

Sworn before me this _____ day of _____, _____.

Day Month Year

Notary Public

Please return a **copy** of the items marked with a ✓ or upload them to our website teamsterfunds.com

Member's Birth Certificate: _____ Spouse's Birth Certificate:_____

Member's Social Security Card: _____ Spouse's Social Security Card: _____

Divorce Decree:_____Property Settlement Agreement:_____

Marriage Certificate:_____ Death Certificate:_____

Spouse's Name change verification: _____ All documents already on file:_____