



# IRON WORKERS

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## Mid-America Pension Plan – Mid-America Supplemental Monthly Annuity (SMA) Fund

PAUL E. FLASCH, *Administrator*

KELLY WILLIAMSON, *Contribution Accounting Supervisor*

SPIRIT MONAHAN, *Delinquent Account Coordinator*

Dear Retiree,

We are making an exciting change at the Fund Office in 2019!

You received this letter because you are currently receiving your monthly retirement benefit via a paper check each month. The check is mailed to your address on the last business day of each month.

The Fund Office is offering you the opportunity to receive your monthly retirement benefit via an electronic deposit directly into your bank account. There are a couple advantages to receiving your benefit via electronic deposit.

First, it is very reliable. It will be deposited in your bank on the date scheduled. You won't have to worry about it getting lost in the mail or having it delayed because of the weather such as the recent snow storm. If you change your bank account, just let us know the new account number by filling out a new Direct Deposit form and we'll take care of the rest.

Second, you will not have to go to the bank anymore to deposit your check since it will be deposited automatically. If you are sick or on vacation you won't have to worry because your deposit will be made automatically.

If you are receiving Social Security benefits, you already have to use direct deposit since they have required it for years. If you are soon applying for Social Security, this is something that will need to be done anyway. So consider doing it now!

To help you make this transition, enclosed is a sign up form for Direct Deposit. Simply fill out the form, attach a voided check at the bottom and sign the form. Then mail, fax or email the completed form to the Fund Office. If we receive it by the 20<sup>th</sup> of a month, we should be able to implement it on the next monthly check run.

Please sign up for this option ***as soon as possible***. It will make receiving your pension so much easier and you'll wonder why you didn't do it earlier.

Thanks and have a safe Winter season.

Sincerely,

The Fund Office Staff

**IRON WORKERS MID-AMERICA PENSION PLAN**

**DIRECT DEPOSIT**

**FAX: 708-474-9982**

**EMAIL: PENSION@IWMIDAMERICA.COM**

**Participant/Spouse/Beneficiary/Alternate Payee Information**

Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Address: \_\_\_\_\_

Number & Street

City & State

Zip Code

Email

Telephone Number: \_\_\_\_\_

**Bank Information**

Name of Bank: \_\_\_\_\_

**Type of Account (Must be Checking or Savings)**

Checking

Savings

A voided check (see below) or a letter from your financial institution stating your account number and bank routing number must be submitted with this form. The account in which the benefit is deposited must be held solely or jointly in the pension recipient's name. The Fund Office will not make any changes until all information on this form is provided. Failure to provide this information may result in the delay of your pension benefit.

Bank Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

*I certify that I am entitled to this pension benefit. In signing this form, I authorize my pension benefit to be electronically transferred to the financial institution named above to be deposited to the designated account.*

\_\_\_\_\_  
Participant/Spouse/Beneficiary/Alternate Payee Signature

\_\_\_\_\_  
Date

**Place voided check here or attach letter from your financial institution.**