



NORTHWEST GLASS, MOLDERS, POTTERY, PLASTICS AND ALLIED WORKERS PENSION TRUST

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Administered by
Welfare & Pension Administration Service, Inc.

What to expect when you apply for your Retirement Benefits

The following is a list of the steps necessary to complete your retirement process. **The entire process can take up to 60-90 days.** If at any time you have questions regarding your retirement, please feel free to call us and we'll be happy to assist you. Please check off the steps as they are completed.

☐ Complete a Retirement Application

When you wish to retire, you must complete a Retirement application to receive retirement benefits. Applications are available from the Administration Office, your Union Office or you may print one from the website at www.wmipension.org. **Please allow at least 30 days from receipt of your original application by the Administration Office to receive your acknowledgement letter and confirmation of your Retirement Effective date.** You must follow all instructions on the application and submit the original copy to the Administration Office, along with the following documents applicable to you:

- A photocopy of a Birth or Baptismal Certificate
- A complete copy of any and all Divorce/Legal separation decree(s) with property settlement agreements for divorces occurring after December 31, 1984, and Qualified Domestic Relation Orders (if applicable)
- You must Terminate your employment with any current or former participating employer before your effective date.

☐ Receive your Election Packet

Applications are processed based off effective date and in order of receipt. You will be sent a packet personalized for you (and your spouse if applicable). This packet will include your Election form for your Retirement (which quotes your monthly benefit amount with all options available to you), Tax form and Bank form, and return to work form.

☐ Complete and Return your Election Packet Forms

Election Form - Your Election form must clearly indicate the retirement option you wish to receive. **Both** you and your spouse (if applicable) must make your Election and sign the form **together in front of a Notary Public**. If you elect to receive one of the Survivor Options, you must also send:

- A photocopy of a Birth or Baptismal Certificate for your spouse
- A copy of your Marriage Certificate
- If either you or your spouse have changed your name due to marriage, divorce, or any other reason, it is necessary that you submit supporting documents such as Marriage Certificate(s), or other legal documents pertaining to the name change.

Tax Form - All of your retirement is subject to Federal Income Tax. Federal Income Tax will be withheld based upon your instructions.

Bank Form - We recommend you have your monthly retirement payment sent electronically to your bank each month. Payments are sent to your bank for deposit on the 1st of each month.

☐ Retirement Benefits approved

When your completed retirement paperwork has been received, processed, and approved by the Administration Office, you will receive a letter advising when your retirement benefit payments will begin. This is called your **Award Letter**. If late hours are received from your employer following your retirement, your benefits will be increased retroactive to your retirement date once all hours are received.

☐ Congratulations!

If all the steps are checked above, you have completed the retirement process. Thank you for all your years of service with the Northwest Glass, Molders, Pottery, Plastics and Allied Workers Pension Trust!