

# NORTHERN CALIFORNIA PIPE TRADES TRUST FUNDS FOR UA LOCAL 342

935 Detroit Avenue, Suite 242A, Concord, CA 94518-2501 • Phone 925/356-8921 • Fax 925/356-8938

tfo@ncpttf.com • www.ncpttf.com



## ELECTRONIC FUNDS TRANSFER (“EFT”) REQUEST FORM

I request that my monthly Retirement Benefit from the Northern California Pipe Trades Pension Plan be sent to my bank (or other Financial Institution shown below) through Electronic Funds Transfer. **I understand that this Form must be received by the Trust Fund Office by the 15<sup>th</sup> of the month in order for the information to be processed and approved by my Financial Institution. If this form is received by the Trust Fund Office by the 15<sup>th</sup> of the month it will generally be effective the 1<sup>st</sup> of the following month.**

I. **NAME:** \_\_\_\_\_ **LAST 4 DIGITS OF SSN: xxx-xx-** \_\_\_\_\_  
(Please Print)

**ADDRESS:** \_\_\_\_\_  
\_\_\_\_\_  
(City) (State) (Zip Code)

**Telephone Number** (\_\_\_\_\_) \_\_\_\_\_ **Email Address** \_\_\_\_\_

If your address is NEW, please check here

## II. FINANCIAL INSTITUTION

Name \_\_\_\_\_ Phone #(\_\_\_\_\_) \_\_\_\_\_

Branch Mailing Address \_\_\_\_\_  
(Street/Box Number)  
\_\_\_\_\_  
(City) (State) (Zip Code)

### ACCOUNT NUMBER (please check only one)

\_\_\_\_\_ **CHECKING ACCOUNT** My 9 digit Bank Routing Number is: \_\_\_\_\_  
**(Please attach a “voided” check)**  
My Checking Account Number is: \_\_\_\_\_

\_\_\_\_\_ **SAVINGS ACCOUNT** My 9 digit Bank Routing Number is: \_\_\_\_\_  
My Savings Account Number is: \_\_\_\_\_

As Retirement Benefit payments become due to me from the Northern California Pipe Trades Pension Plan, I authorize the Trust Fund Office to electronically transfer such monthly Retirement Benefits to the above-named Financial Institution for credit to my account. I authorize said Financial Institution to refund an amount equal to any payment which was transferred to my account after my death or to charge the account accordingly. I reserve the right to cancel this authorization and direction by giving written notice to the Trust Fund Office at any time. I understand that if I close my account on file with the Trust Fund Office and my Electronic Funds Transfer is rejected from the Financial Institution a replacement check will not be issued by the Trust Fund Office until the next scheduled check release date, generally scheduled for mid-month.

I will notify the Trust Fund Office when I change my permanent residence and advise, at that time, if payments are to continue to be electronically transferred to the Financial Institution named above.

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

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**TO: ALL RETIREES OR BENEFICIARIES CURRENTLY RECEIVING MONTHLY RETIREMENT BENEFIT CHECKS**

**FROM: TRUST FUND OFFICE**

**RE: NORTHERN CALIFORNIA PIPE TRADES PENSION TRUST FUND  
Electronic Funds Transfers (“EFT”)**

In order to increase efficiencies and reduce the risk of theft, the Northern California Pipe Trades Pension Trust is **strongly** recommending that **ALL** retirees and/or beneficiaries use Electronic Funds Transfer (“EFT”). EFT enables your monthly Retirement Benefit payment to be deposited automatically to the Financial Institution of your choice.

Whether at home or away, your funds are available in your account immediately without bank or mail delays and there is no more worry about mail theft. If you are on vacation or in the hospital, you don't need to worry about depositing your Retirement Benefit check. You will continue to receive an EFT Statement, sent to your home as confirmation of the transaction.

The Trust Fund Office does not consider a check lost in the mail until the 10<sup>th</sup> day of each month. A replacement check will not be issued until our next scheduled check release date, generally scheduled for mid-month.

If you have any questions, please contact the Pension Department at 925/356-8921, ext. 512, and a Representative will gladly assist you.