

Industrial Carpenters and Precast Pension Trust Fund

DIRECT DEPOSIT REQUEST

Name of Payee: _____ Payee SS#: _____
Address: _____ Phone # _____
City: _____ State: _____ Zip Code: _____
Member's Name (if different from Payee): _____ Member's SS#: _____

I, the undersigned, hereby authorize the Board of Trustees of the Industrial Carpenters and Precast Trust Fund ("Plan") to deposit all amounts due to me under the Plan in my account at the Financial Institution named below. This authorization shall remain in force until I revoke it in writing or until my death, whichever occurs first. If, due to lack of knowledge of my death, the Plan distributes benefit checks after my death for deposit in my account, I authorize and direct the Financial Institution to refund to the Plan any amounts paid after my death.

Signature of Payee

Date

The following is to be completed by the Financial Institution

AGREEMENT OF FINANCIAL INSTITUTION

The Financial Institution named below agrees to accept for deposit in the account specified below, benefit checks payable by Industrial Carpenters and Precast Trust Fund. The Financial Institution agrees to refund to the Plan, the amount of any pension benefit checks deposited in the Payee's account which represents pension benefits paid after the death of the Payee, provided that the amount of the deposits remain in the account at the time the request for a refund is received from the Plan. **Please include a voided check with this form.**

Name of Financial Institution _____

Can you accept "Automated Clearing House" transactions? Yes ☐ No ☐

Bank ABA No. _____ Account No. _____

Type of Account: ☐ Checking/Share Draft ☐ Savings

Branch _____ Phone # _____

Address _____

City _____ State _____ Zip code _____

Signature of Authorized Representative

Title

Date

Please return completed form properly signed to:

1731 Technology Drive, Suite 570

San Jose, CA 95110

Phone: (925) 208-9997 • Fax (925) 362-8564

E-mail: Staff@IndCarpBenefits.org

Website: www.IndCarpBenefits.org