



# Eighth District Electrical Fringe Benefit Funds



TO: Plan Participants and Beneficiaries  
FROM: Board of Trustees of the Eighth District Electrical Pension Fund Annuity Plan  
RE: Notice of Changes to the Annuity Plan  
DATE: June 2022

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The Board of Trustees adopted an amendment to the Eighth District Electrical Pension Fund Annuity Plan ("Plan") as restated and effective April 1, 2014. The purpose of this notice is to summarize the amendments for you. **You should keep this notice with your current Summary Plan Description for the Plan (2011 edition).** For more information and a copy of the amendment referenced in this notice, please contact the Administrative Office at (844) 989-2321 or visit the Plan's website at <http://www.8thDistrictBenefits.org>.

## **AMENDMENT 14**

Effective January 1, 2022, Section 7.03 of the Plan was amended to revise the Plan's survivor designation of beneficiary provision. Both before and after Amendment 14, if the surviving Spouse or other Beneficiary of a deceased Participant dies after entitlement to payment but before receiving payment of the Participant's Accumulated Share, then payment shall be made to the designated Beneficiary of the surviving Spouse or other Beneficiary, as applicable.

However, as explained below, Amendment 14 changes who is entitled to the Participant's Accumulated Share where the surviving Spouse or other Beneficiary of a deceased Participant is entitled to payment but does not designate a Beneficiary and dies before receiving payment of the Participant's Accumulated Share.

### **Old Rule – Surviving Spouse or other Beneficiary Dies without Designating a Beneficiary**

Prior to Amendment No. 14, Section 7.03 provided that if the surviving Spouse or other Beneficiary of a deceased Participant is entitled to payment but does not designate a Beneficiary, and dies before receiving payment of the Participant's Accumulated Share, then the Participant's Accumulated Share shall be paid to the following parties in the following order of priority:

- (i) To the deceased Spouse or Beneficiary's surviving lawful Spouse;
- (ii) To the deceased Spouse or Beneficiary's surviving child or children in equal shares;
- (iii) To the deceased Spouse or Beneficiary's surviving parent or parents in equal shares;
- (iv) To the deceased Spouse or Beneficiary's surviving sibling or siblings in equal shares; or
- (v) To the deceased Spouse or Beneficiary's executor or administrator.

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**New Rule – Surviving Spouse or other Beneficiary Dies without Designating a Beneficiary**

Amendment No. 14 revises Section 7.03, effective January 1, 2022, to provide that if the surviving Spouse or other Beneficiary of a deceased Participant is entitled to payment but does not designate a Beneficiary, and dies before receiving payment of the Participant's Accumulated Share, then the Participant's Accumulated Share shall be paid to the following parties in the following order of priority:

- (a) To the surviving Spouse of the deceased Participant; or, if none,
- (b) To the surviving child or children of the deceased Participant, in equal shares; or, if none,
- (c) To the surviving parent or parents of the deceased Participant, in equal shares; or, if none,
- (d) To the surviving sibling or siblings of the deceased Participant, in equal shares; or, if none,
- (e) To the executor or administrator of the deceased Participant; or, if none,
- (f) In any manner chosen by the Trustees, subject to all applicable law.

If you have any questions about these changes, please contact the Administrative Office.