

THE NATIONAL ELEVATOR INDUSTRY PENSION PLAN ENROLLMENT FORM FOR DIRECT DEPOSIT OF PENSION PAYMENTS

This form must be completed in order for you to promptly receive your pension payment by direct deposit. Unless you notify the Benefits Office that you want to receive your pension payment by check, your pension payments will be made by direct deposit. If you wish to receive your pension payment by check rather than direct deposit, please carefully review the attached notice “**Considering Receiving Your Pension Payment by Check Rather than Direct Deposit?**” and call the Benefits Office as soon as possible.

APPLICANT INFORMATION

SOCIAL SECURITY NUMBER (last 4 digits only) or ALT ID # _____

PENSIONER'S NAME _____

ADDRESS _____

TELEPHONE(_____) _____

I am the payee under the above Social Security number and I hereby request that until further written notice from me is filed with Pension Plan Administrator, all payments be directly deposited in my account at the Bank designated below. I authorize the Bank designated to debit my account and to refund any overpayments to the National Elevator Industry Pension Plan.

PENSIONER'S SIGNATURE _____ DATE _____

BANK INFORMATION

FOR DEPOSIT TO MY ACCOUNT NUMBER _____

TYPE OF ACCOUNT (Check ONE Only) Checking Savings

NOTE → If checking account, attach a blank personal check (marked VOID)

NAME AND ADDRESS OF BANK TO WHICH PAYMENT IS TO BE MADE

Bank Name _____

Address _____

City _____ State _____ Zip Code _____

Bank Routing Number _____ - _____ - _____

Bank Telephone Number(_____) _____ (Ext.) _____

RETURN THIS FORM TO:

National Elevator Industry Pension Plan
Attn: Finance Department
19 Campus Blvd., Ste. 200
Newtown Square, PA 19073-3288
Fax (610) 557-4516

Considering Receiving Your Pension Payment by Check Rather than Direct Deposit?

The National Elevator Industry Pension Plan has developed a dependable DIRECT DEPOSIT service under which we will deposit your pension payments in your checking or savings account. With Direct Deposit you can be assured that your money will be in your account on the first business day of each month for immediate use. Other advantages of Direct Deposit include: (1) avoids mail delays; (2) eliminates the possibility that your pension check will be lost or stolen; (3) allows you to be away from home without delay in having your benefit available to you; and (4) eliminates a special trip to the bank each month.

Enrolling in Direct Deposit

You must complete the **Enrollment Form for Direct Deposit of Pension Payments** and return the form to the Benefits Office address shown on the bottom of the form. You will be advised by letter as to when your DIRECT DEPOSIT will begin.

You will receive a monthly NOTICE OF DEPOSIT which is a check stub showing the amount of pension monies deposited into your account, any deductions you have elected to have withheld from your pension, and year-to-date figures. It is recommended that these stubs be retained for tax planning purposes.

Opting Out of Direct Deposit (Electing to Receive Your Payment by Check)

If you have certain circumstances where Direct Deposit is not feasible, such as you have retired outside the United States, are in a nursing home or other extenuating circumstances please call the Benefits Office to discuss your circumstances and request pension payment by check. It is our policy to mail all checks two business days prior to the scheduled pay date. Please be aware that once payments are sent to the Post Office, we have no control over the length of delivery time and your pension check may not be delivered on the first of the month. Please be patient as checks are frequently received late and a replacement check will only be issued after the 8th day of the month.

If you have any questions concerning direct deposit, or require your pension payment by check please contact:

National Elevator Industry Pension Plan

Finance Department

1-800-523-4702

Follow prompts #4, #5, #2

Fax 610-557-4516

NATIONAL ELEVATOR INDUSTRY PENSION PLAN

19 CAMPUS BLVD STE 200

NEWTOWN SQUARE, PA 19073-3288