

Locals 302 and 612 of the International Union of Operating Engineers Trust Funds

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Administered by
Welfare & Pension Administration Service, Inc.

Name:

WPASID:

Questionnaire Regarding Post-Retirement Service

You requested review of whether certain post-retirement employment will be considered “Post-Retirement Service” under the Plan for which retirement benefits will be suspended. To assist in this review, please provide the following information with as much detail as possible.

1. Describe your education, including any apprenticeship training or certifications you have received. Include dates of any degrees.

1. (a) Do you currently have a Commercial Driver’s License (CDL) Yes _____ No _____
(b) If yes, Please state where and when you obtained your CDL _____

2. Summarize the type of work you performed **when working for employers that contributed to the Plan on your behalf**. Include all work since you began participation in the Pension Plan. Attach additional sheets if necessary.

3. List all Core Skills required for the work listed in Paragraph #2. **(Skills for work for employers that contributed to the Plan on your behalf.)**

4. List all Core Duties required for the work listed in Paragraph #2.

5. **Did you ever work as a foreman, superintendent or in another supervisory capacity when working for employers that contributed to the Plan on your behalf?** If yes, please provide detail, including employer, job title, responsibilities and period of such employment.

6. Who is the employer you are/seek to work for in post-retirement employment?

7. In what State is the post-retirement employment?

8. Describe your skills, certifications (if any) and qualifications necessary for the post-retirement employment.

9. How did you obtain the skills, certifications (if any) and qualifications needed to perform the post-retirement employment?

10. Describe additional training or certifications required by the employer to qualify you to perform the post-retirement employment.

11. What are/will your duties be in the post-retirement employment? Please also attach an employer-issued job description.

12. What Core Skills are required for the post-retirement employment?

13. Where did you learn the skills required for the post-retirement employment?
