

# 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”) Form

### Instructions

- Please first read the information on the reverse side of this Form.
- Complete, sign, and return this Form to the Trust Fund Office to have the information processed and approved by your Financial Institution.
- Generally, completed Forms received by the 10<sup>th</sup> of the month, will be effective the 1<sup>st</sup> of the following month.

**IMPORTANT: This Form revokes any prior EFT Form previously submitted.**

### **SECTION 1: Participant Information**

Please complete the following:

Name \_\_\_\_\_ Last 4 digits of SSN xxx-xx- \_\_\_\_\_

Address \_\_\_\_\_  
Street or PO Box \_\_\_\_\_ City, State, Zip \_\_\_\_\_

Primary Phone # (\_\_\_\_\_) \_\_\_\_\_ Secondary Phone # (\_\_\_\_\_) \_\_\_\_\_

Email Address \_\_\_\_\_

### **SECTION 2: Account Information (Please check only one)**

**CHECKING ACCOUNT** (Please attach a “voided” check)

Financial Institution Name: \_\_\_\_\_

9-digit Bank Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

- OR -

**SAVINGS ACCOUNT**

Financial Institution Name: \_\_\_\_\_

9-digit Bank Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_

As Retirement Benefit payments become due to me from the Northern California Pipe Trades Pension Plan, I authorize the Plan to electronically transfer my monthly Retirement Benefits to my account with the above-named Financial Institution. 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 by notifying the Trust Fund Office at any time. I understand that if I close my account on file with the Trust Fund Office and/or my Electronic Funds Transfer is rejected from the Financial Institution, a replacement check will not be issued until the next scheduled check release date, generally scheduled for mid-month. I understand that I am required to complete a new EFT Form upon closure of my account on file.

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

Return the completed and signed Form to:

NCPTTF  
935 Detroit Avenue, Suite 242A  
Concord, CA 94518-2501

Fax: 925/356-8938  
Email: [tfo@ncpttf.com](mailto:tfo@ncpttf.com)

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**TO: All Retirees or Beneficiaries currently receiving monthly Retirement Benefit payments**

**RE: Northern California Pipe Trades Pension Trust Fund (“Plan”)  
Electronic Funds Transfers (“EFT”)**

In order to increase efficiencies and reduce the risk of theft, the Plan **requires** that **all** Retirees, Beneficiaries, and Alternate Payees use Electronic Funds Transfer (“EFT”). EFT enables your monthly Retirement Benefit payment to be electronically transferred to the Financial Institution of your choice.

Whether at home or away, your funds are available in your account immediately (on the first business day of the month) without bank or mail delays and there is no more worry about mail theft.

If you are on vacation or have notified the Trust Fund Office that you are temporarily away, you will continue to receive your monthly Retirement Benefit electronically transferred to your account on file.

If you have any questions, please contact the Pension Department at 925/356-8921, ext. 712.