



**Required Documents to support Loss of Future Earnings/Benefits – Union Members
(also see FAQ #6.41 for more details)**

If your union appears in the table below, then the VCF has already received some of the information necessary to calculate pension loss. Therefore, if you are submitting a claim for loss of future earnings/benefits, **please see below for the documents you must submit in order for the VCF to calculate your loss.** The chart only lists documents related to loss of pension and other benefits. As with all other claims for lost earnings, **union members must also submit documents establishing a disability and the amount of earnings lost.** Please see the Compensation Form Tip Sheet for information on other documents that must be submitted with your claim for lost earnings.

Union	Required Documents
<p>32-BJ – Building Services Program A</p>	<ul style="list-style-type: none"> • A document or letter showing: <ul style="list-style-type: none"> • Confirmation that Claimant is a member of Pension Plan Program A • Union membership start date (“fund hire date”) • Date last worked in covered employment • Retirement or membership end date • Confirmation if Claimant is a Commercial or Residential worker • Number of vested credits • If Claimant received Long-Term Disability benefits through union: start date, end date, and amount of benefits • Confirmation if Claimant participated in the Early Retirement Incentive Program • Date of start of pension, amount of pension, and type of pension that Claimant receives (e.g. service, disability)
<p>Local 1 – Plumbers of New York City</p>	<ul style="list-style-type: none"> • Work history showing the hours worked in every year of work • A document or letter showing: <ul style="list-style-type: none"> • Member’s start date with union • Member’s retirement date • Pension credits earned • Date of start of pension and amount of pension
<p>Local 3 - IBEW</p>	<p>Members with an “A” rate of pay/classification</p> <ul style="list-style-type: none"> • The VCF needs the following information and documents to calculate pension loss, if applicable, from the Local 3/JIBEI pension fund, the National Electrical Benefit Fund, the IBEW Pension Fund, and the National Electrical Annuity Plan: <ol style="list-style-type: none"> 1. Membership start date 2. Job level (e.g. journeyman) 3. Member’s Division: <ol style="list-style-type: none"> a. Fixture, Manufacturing, or Supply divisions, or b. Electrical Industry 4. Local 3/JIBEI Pension fund: <ol style="list-style-type: none"> a. Hours history report showing the number of hours worked by year and credited for pension purposes. b. Indication of whether claimant is vested and years of vesting service. c. Total service credits/years of credited service earned. d. If claimant is receiving a disability or retirement pension or has received a lump-sum pension: <ol style="list-style-type: none"> i. Start date of pension ii. Method chosen for payment (lump-sum, monthly benefit, etc.) iii. Joint/survivor pension option selected and monthly pension amount with option chosen. iv. Type of pension (disability, retirement, etc.) 5. NEBF Pension Fund: <ol style="list-style-type: none"> a. Hours history report showing the number of hours worked by year and credited for pension purposes. b. Indication of whether claimant is vested and years of vesting service. c. Total service credits/years of credited service earned. d. If claimant is receiving a disability or retirement pension or has received a lump-sum pension: <ol style="list-style-type: none"> i. Start date of pension ii. Method chosen for payment (lump-sum, monthly benefit, etc.) iii. Joint/survivor pension option selected and monthly pension amount with option chosen. iv. Type of pension (disability, retirement, etc.) <p>Note: if claimant receives a disability pension from the NEBF, the VCF will assume that the pension was based on Claimant’s Social Security disability unless the Claimant</p>



	<p>submits documents showing a different basis (e.g. medical records submitted with the disability pension application)</p> <ol style="list-style-type: none"> 6. IBEW Pension Fund <ol style="list-style-type: none"> a. Indication of whether claimant is currently vested (through membership dues) b. Total years of vesting service/total years of continuous credited "A" membership c. If claimant is receiving a disability or retirement pension or has received a lump-sum pension: <ol style="list-style-type: none"> i. Start date of pension ii. Method chosen for payment (lump-sum, monthly benefit, etc.) iii. Joint/survivor pension option selected and monthly pension amount with option chosen. iv. Type of pension (disability, retirement, etc.). <p>Note: if claimant receives a disability pension from the IBEW Pension Fund, the VCF will assume that the pension was based on Claimant's Social Security disability unless the Claimant submits documents showing a different basis (e.g. medical records submitted with the disability pension application)</p> <p>The above information will allow the VCF to calculate pension loss as well as a \$0.25/hour contribution to the National Electrical Annuity Plan. Additionally, the VCF will be able to calculate losses from the Local 3 Annuity Plan, the Local 3 401(k) plan, the Health Savings Plan, the Additional Security Benefits Plan, and potentially a higher loss from the National Electrical Annuity Plan if the claimant submits:</p> <ol style="list-style-type: none"> 7. Wage cards or the operative collective bargaining agreement from the claimant's date or retirement through the present <p>Members with a rate of pay/classification that is not "A" The VCF needs all of the above information, including #7, to calculate pension and other benefit loss. That is, while the VCF can calculate pension loss for A members without the wage cards or collective bargaining agreements, it cannot do so for non-A members.</p>
<p>Local 12A - International Association of Heat and Frost Insulators and Allied Workers</p>	<ul style="list-style-type: none"> • A work history report showing: <ul style="list-style-type: none"> • Start date with Local 12A • Last day of work with Local 12A • Hours worked per year with Local 12A
<p>Local 15 - International Union of Operating Engineers</p>	<ul style="list-style-type: none"> • "Participant Basic Data Report" • An indication of the member's category before retiring (Cement League or General Contractors Association (G.C.A.); Building Contractors Association (B.C.A.); Contractors Association of Greater New York (C.A.G.N.Y.); Steel; or Utility) • If claimant receives a pension from the Central Pension Fund: <ul style="list-style-type: none"> • Letter from the Central Pension Fund providing amount, start date, and type of pension (if claimant receives a pension) • The Central Pension Fund "Calculation Worksheet" showing how the pension was calculated. If the claimant's pension amount has changed at any point in time (for example, if the member received a disability pension prior to reaching age 55, and then received a different amount after turning 55), the claimant should submit a Calculation Worksheet for each time the amount changed. • If claimant does <u>not</u> receive a pension from the Central Pension Fund: <ul style="list-style-type: none"> • The final Semi-Annual Benefit statement the claimant received from the Central Pension Fund
<p>Local 46 – Metal Lathers</p>	<ul style="list-style-type: none"> • "Member Inquiry" document, which shows the following information: <ul style="list-style-type: none"> • Initiation date • Monthly pension amount (if Claimant receives a pension) • Date retired • Pension credits earned to date • Vesting credits earned to date and year that Claimant became vested • Date last worked • "Member Service Credit" document, which shows the following information by year: <ul style="list-style-type: none"> • Hours worked • Taxable gross wages • Pension credits • Vesting service credits • Confirmation of whether Claimant was a journeyman/foreman or apprentice • Type of pension that Claimant receives (e.g. service, disability)



Union	Required Documents
Local 78 - Asbestos, Lead & Hazardous Waste Laborers	<ul style="list-style-type: none"> • Mason Tenders' DC Pension Fund "Pension Work History" printout, showing hours worked and vested and credited service per year • Mason Tenders' DC Trust Funds "Personal Statement of Contributions" showing detailed hours worked per year • Letter from Mason Tenders' District Council Trust Funds indicating pension start date and disability (or other) pension amount awarded (if claimant receives a pension) • A screenshot from the Mason Tenders District Council Annuity Fund showing annuity contributions, forfeitures, payouts, investment return and balance (<i>this is helpful but not mandatory</i>)
Local 79 - General Building Laborers'	<ul style="list-style-type: none"> • Mason Tenders' DC Pension Fund "Pension Work History" printout, showing hours worked and vested and credited service per year • Mason Tenders' DC Trust Funds "Personal Statement of Contributions" showing detailed hours worked per year • Clarification on whether claimant is Local 79 regular or "Local 79 Tier B Demolition" • A document or letter showing: <ul style="list-style-type: none"> • Member's start date with union • Member's retirement date • The number of service credits and vested credits accumulated as of retirement • Date of start of pension and amount of pension (in single life annuity form)
Local 94 - International Union of Operating Engineers	<ul style="list-style-type: none"> • "Participant Basic Data Report" • If claimant receives a pension from the Central Pension Fund: <ul style="list-style-type: none"> • Letter from the Central Pension Fund providing amount, start date, and type of pension (if claimant receives a pension) • The Central Pension Fund "Calculation Worksheet" showing how the pension was calculated. If the claimant's pension amount has changed at any point in time (for example, if the member received a disability pension prior to reaching age 55, and then received a different amount after turning 55), the claimant should submit a Calculation Worksheet for each time the amount changed. • If claimant does <u>not</u> receive a pension from the Central Pension Fund: <ul style="list-style-type: none"> • The final Semi-Annual Benefit statement the claimant received from the Central Pension Fund
Local 197 - United Derrickman	<ul style="list-style-type: none"> • Work history showing the hours worked in every year of work • A document or letter showing: <ul style="list-style-type: none"> • Member's start date with union • Member's retirement date • Pension credits earned • Date of start of pension and amount of pension
Local 580 - Architectural and Ornamental Iron Workers	<ul style="list-style-type: none"> • "Pension Credit History" document showing hours worked and credits earned per year • Letter from Fund Office of Local 580 showing membership date, individual's level (e.g. journeyman), and amount, start date, and type of pension (if claimant receives a pension) <p><i>Note: The VCF may be able to obtain these documents directly from the union but it may expedite your claim if you submit them with your Compensation Form.</i></p>
Local 638 - Steamfitters Construction Trades	<ul style="list-style-type: none"> • "Member Work History Annual Rollup Report" showing hours, wages and credits per year • A document or letter showing: <ul style="list-style-type: none"> • Member's start date with union • Member's level at time of retirement (journeyman; temp heat and air conditioning; apprentice) • Date of start of pension and amount of pension (in single life annuity form)
Local 780 - Cement Masons	<ul style="list-style-type: none"> • Work history showing the hours worked in every year of work (such as the "Member Contributions Printout") • A document or letter showing: <ul style="list-style-type: none"> • Member's start date with union • Member's retirement date • Pension credits earned • Date of start of pension and amount of pension



Union	Required Documents
Consolidated Edison CECONY Management and CECONY Weekly - Local 1-2	<ul style="list-style-type: none"> • The “Consolidated Edison Retirement Plan” printout that contains the following sections: <ul style="list-style-type: none"> • Pension Summary • Data • Salary History • Alternative Formula • Standard Formula • Statement of Final Benefits • CECONY Management claimants should also submit (but CECONY Weekly claimants do not need to submit): <ul style="list-style-type: none"> • If claimant receives a disability pension, a decision by the pension fund granting the disability pension and showing what conditions/injuries that decision is based upon
New York City District Council of Carpenters	<ul style="list-style-type: none"> • “Pension Statement” showing hours worked, contribution amounts, credits earned, and benefit amounts by year, as well as information on the monthly pension amount available to the member under various pension options <i>Note: this document can be downloaded from the New York City District Council of Carpenters Benefit Funds website</i> • “Participant Work History Detail Report” • Letter from New York City District Council of Carpenters Benefit Funds showing membership date, individual’s level (e.g. journeyman), and amount, start date, and type of pension (if claimant receives a pension) <p><i>Note: The VCF will calculate pension and annuity loss for the Carpenters trades using Carpenter Building Commercial Rates. If you believe your loss should be calculated using other rates, you must inform the VCF and provide documentation showing which rates should be applied and why.</i></p>