

ILWU-PMA BENEFIT PLANS /

International Longshore & Warehouse Union —
Pacific Maritime Association www.benefitplans.org

1188 FRANKLIN STREET • SUITE 101 • SAN FRANCISCO, CALIFORNIA 94109

PHONE (415) 673-8500

FAX (415) 749-1400

ILWU-PMA Pension Plan
ILWU-PMA Welfare Plan

ILWU-PMA Watchmen Pension Plan

August 4, 2023

TO: ILWU Longshore, Ship Clerk and Walking Boss/Foreman Locals

FROM: Jacquie Gasparro, Manager, Pension Plans

SUBJECT: ILWU-PMA Pension Plan Participant Status Reports

Participant Status Reports will be mailed to each active ILWU-PMA Pension Plan participant, showing his or her Pension Plan status through 2022. The mailing will begin shortly and will be done on a Local-by-Local basis. A sample report is enclosed.

The Participant Status Report reflects a benefit accrual of \$215.00 for each qualifying year prior to 1994 and for each qualifying year of more than 1300 hours or thereafter. A pro-rated benefit accrual is shown in the report for qualifying years after 1993 of 800 – 1299 hours. Hours under "WRK/PGP HOURS" include Work hours, PGP hours, and Third Shift credit. Hours credited for disability absence are included under "LRC/CMP HOURS". Military service hours are included under "OTHER HOURS". Hours on account of employment after age 60 and/or Low Port are also included under "OTHER HOURS."

If your members have questions about the information shown in the status reports, please let us know. Information that is in error in the reports may be corrected by submitting Form #PF11 with required documentation. A supply of these forms is enclosed, and you may also download it from our website under the section "OTHER PENSION FORMS".

An updated Participant Status Report will be mailed to each active participant following the close of each Payroll Year.

Enclosures

cc: Area Welfare Directors

SAMPLE

**ILWU-PMA PENSION PLAN
1188 FRANKLIN STREET, SUITE 101
SAN FRANCISCO, CA 94109
(888) 372-4598**

August 2023

TO: ILWU-PMA PENSION PLAN PARTICIPANTS

Enclosed is your Participant Status Report (PSR) showing the status of each year from your start in the industry through 2022 and the amount of your accrued monthly benefit through 2022.

Your PSR indicates your total credited years of service under the Pension Plan and your vested status as of the end of the 2022 Payroll Year. Effective January 1, 1999, a Participant is vested in his or her accrued benefit upon attaining five credited Years of Service (or Normal Retirement Age, if earlier), provided that s/he is credited with an hour of service in the 1999 Payroll Year or later.

The pension accrual rate for Participants who retire with a Separation Date on or after July 1, 2014, is \$ 215.00 per month per year for all qualifying years through 1993. Beginning in 1994, 1300 hours (including worked and credited hours) are required for a \$215.00 benefit. A Benefit Accrual of \$215.00 is shown on the PSR for all qualifying years through 1993 and for any year after 1993 with 1300 or more hours. The calculation of pro-rated benefits for years after 1993 of 800 - 1299 hours is shown on the PSR, using a fraction equal to the number of hours worked and/or credited in a year divided by 1300.

Your Total Accrued Monthly Benefit is the sum of the Benefit Accruals in your highest valued qualifying years up to a maximum of 37 years. If this PSR includes more than 37 years, the years excluded from the calculation are designated with an asterisk (*). The maximum monthly basic pension payable is \$7,955.00 based on 37 qualifying years at the \$215.00 rate.

Information about Survivor Benefits: A Survivor Pension is payable to your qualified Surviving Spouse as defined under the Pension Plan in accordance with federal law. If you are a vested active Participant at your death, a Survivor Pension is payable to the person who is legally married to you on the date of your death and for at least a one-year period prior to your death. If your death occurs after you retire, a Survivor Pension is payable to the person who is legally married to you on your Pension Commencement Date and for at least one year ending on that date; or, if the marriage occurs less than one year before your Pension Commencement Date, a Survivor Pension is payable to the person who is legally married to you on your Pension Commencement Date and continuously for a one-year period ending on or before the date of your death. Subsequent divorce does not disqualify the person who meets the definition of a Surviving Spouse from receiving a Survivor Pension in the event of your death as a Pensioner. If there is no qualified Surviving Spouse, a Child Survivor Pension is payable to the Dependent Child(ren) of a Pensioner or vested active Participant, subject to the terms and conditions of the Pension Plan.

Enclosure

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JUNE 22, 2023

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PARTICIPANT STATUS REPORT

NAME
ADDRESS
CITY, ST ZIP

SAMPLE

LOC-REGISTRATION# : XX-12345
DATE OF BIRTH : 11/01/1980
NORMAL RET. DATE : 11/01/2045
REGISTRATION DATE : 8/29/2015
DEREGISTRATION DATE:
INDUSTRY START YEAR: 2006

Subject: ILWU-PMA Pension Plan - Participant Status Report

The purpose of this report is to inform you of your status as a Participant in the ILWU-PMA Pension Plan.

PLAN YEAR	WRK/PGP HOURS	VAC HOURS	HOL HOURS	LRC/CMP HOURS	OTHER HOURS	TOTAL HOURS	BENEFIT CR	VEST CR	STATUS
2006	8	0	0	0	0	8	0.00000	0	BREAK-IN-SERVICE
2007	48	0	0	0	0	48	0.00000	0	BREAK-IN-SERVICE
2008	40	0	0	0	0	40	0.00000	0	BREAK-IN-SERVICE
2009	24	0	0	0	0	24	0.00000	0	BREAK-IN-SERVICE
2010	388	0	0	0	0	388	0.00000	0	BREAK-IN-SERVICE
2011	577	0	0	0	0	577	0.00000	0	NON-QUALIFYING
2012	1,107	0	0	0	0	1,107	0.85154	1	QUALIFYING
2013	1,385	0	0	0	0	1,385	1.00000	1	QUALIFYING
2014	1,947	0	0	0	0	1,947	1.00000	1	QUALIFYING
2015	2,057	0	24	0	0	2,081	1.00000	1	QUALIFYING
2016	2,701	80	96	0	0	2,877	1.00000	1	VESTED
2017	2,779	80	104	0	0	2,963	1.00000	1	QUALIFYING
2018	3,305	80	104	0	0	3,489	1.00000	1	QUALIFYING
2019	3,675	80	104	0	0	3,859	1.00000	1	QUALIFYING
2020	3,018	120	112	0	0	3,250	1.00000	1	QUALIFYING
2021	2,994	120	96	0	0	3,210	1.00000	1	QUALIFYING
2022	3,084	120	88	0	0	3,292	1.00000	1	QUALIFYING

VESTED YEAR: 2016

TOTAL BENEFIT CREDITS: 10.85154
EST. ACCRUAL RATE : \$215.00
*EST. MONTHLY BENEFIT: \$2,333.08

Some of the information on this Report may be unverified. Any information found to be in error will be corrected. No one should act on the basis of the information shown on this report when he knows that the information is in error. If you believe any of the information shown is in error, please contact the Pension Plan Office.

Trustees - ILWU-PMA Pension Plan

*(TOTAL BENEFIT CREDITS x EST. ACCRUAL RATE = EST. MONTHLY BENEFIT).

SAMPLE

TO: ILWU-PMA Pension Plan

FROM: Name _____ Local _____ Reg. No. _____

SUBJECT: ILWU-PMA Pension Plan Participant Status Report

Please review my status under provisions of the ILWU-PMA Pension Plan in relation to the following additional information:

I request credit for additional hours because of an absence due to industrial illness or injury for which I received compensation. An LS-208 and/or Department of Labor Settlement (included on the LS-208 or submitted separately) is enclosed for the following payroll year(s):

For Pension industrial disability credit: all LS-208s must be signed and dated by the Worker's Comp carrier. Department of Labor (8i) Settlements (listed on LS-208 and/or submitted separately) must be signed and dated by the approving Judge. Disability Credit is only applied to the registered years under the Pension Plan.

I request credit for additional hours which have already been granted to me by my Joint Port Labor Relations Committee (for payroll years beginning with 1973) for non-industrial disability absences (up to 200 hours per payroll year). JPLRC verification of hours granted to me is enclosed for the following payroll years:

For Pension Plan non-industrial disability credit: The Pension Plan requires that a physician certify the disability from the beginning date(s) to the ending date(s) of your disability period(s). Doctors notes must be legible, signed and dated after the time requested for credit.

I request credit for additional hours for non-industrial disability illness or injury (up to 200 hours per payroll year).

For Pension Plan non-industrial disability credit: The Pension Plan requires that a physician certify the disability from the beginning date(s) to the ending date(s) of your disability period(s). Doctors notes must be legible, signed and dated after the time requested for credit.

I request credit for a period of absence due to service in the United States Armed Services. Military Service papers showing dates of entry to and discharge from the military are enclosed for the following payroll year(s): _____.

Other corrections requested:

Please recheck payroll year(s) _____.

I worked in the following ports during such years _____.

My birthdate as shown on the Participant Status Report is incorrect. Verification of my correct birthdate (a copy of my birth certificate or Driver's License or Passport) is included.

My Social Security number is incorrect. Verification of my correct Social Security number (a copy of Social Security Card) is included.

Other (please specify) *** _____

*** **All name changes must be approved and submitted with signed JPLRC minutes**

Mail, Fax or Email as follows: ILWU-PMA Pension Plan
1188 Franklin Street – Suite 101
San Francisco, CA 94109
Fax (415) 749-1321
Email: pension@benefitplans.org