

# Texas Carpenters and Millwrights Benefits Program

## RECIPROCAL TRANSFER AUTHORIZATION FORM

Name: \_\_\_\_\_ Social Security No: \_\_\_\_\_

Home Address: \_\_\_\_\_ Home Local Union No: \_\_\_\_\_

\_\_\_\_\_ Outside Local Union No: \_\_\_\_\_

Home Telephone Number: ( \_\_\_\_\_ ) \_\_\_\_\_

Outside Cooperating Fund: Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

### Contributions should be transferred to the Home Funds for (check all that apply):

- Texas Carpenters and Millwrights Health & Welfare Fund
- Carpenters & Millwrights of Houston & Vicinity Pension Fund
- Carpenters Labor Management Pension Fund
- North Texas Carpenters Retirement Plan - 401(a) Annuity

Contributions should be transferred on behalf of all of the above checked Home Funds, and sent to:

1300 South Meridian Avenue, Suite 200  
Oklahoma City, OK 73108-1751

I hereby request and authorize the Board of Trustees of the above designated Outside Cooperating Fund to transfer all the health & welfare, pension, and annuity contributions actually received on my behalf to the Board of Trustees of the above designated Home Fund(s).

I understand that the Outside Cooperating Fund will act solely as the agent of the noted Home Fund(s) as such, I shall be subject to the eligibility rules of said Home Fund(s) upon the transfer of contributions. I hereby release (on behalf of myself as well as on behalf of anyone claiming through me) and further discharge the Outside Cooperating Fund and their Trustees of and from all claims, demands, actions, causes of actions or suits with respect to any contributions transferred and for any benefits or credits which would have accrued or become payable to me had I not authorized this transfer of contributions. I further recognize that the transfer of contributions to the noted Home Fund(s) may or may not ultimately prove to be to the advantage of myself and/or my beneficiaries.

The provisions of the United Brotherhood of Carpenters and Joiners of America International Reciprocal Agreement for Carpenters Health & Welfare Funds, Pension Funds and Annuity Funds are hereby incorporated by reference.

This contribution transfer request and authorization shall remain in full force and effect so long as I work within the jurisdiction of the above-named Outside Cooperating Fund or until I notify the Outside Cooperating Fund Administrator in writing that I desire to revoke my Transfer Authorization.

Signature \_\_\_\_\_

Date Signed: \_\_\_\_\_

This form must be signed, dated and submitted to the Outside Cooperating Fund as soon as possible, but no later than 60 days of commencing employment in jurisdiction of the Outside Cooperating Fund.