



DIRECT DEPOSIT FORM FOR YOUR VACATION, HOLIDAY AND SICK LEAVE BENEFIT PAYMENTS

If you would like your annual Vacation, Holiday and Sick Leave benefit payments automatically deposited in your bank account, please complete and return this form to the Carpenter Funds Administrative Office. Automatic deposits are optional and if the Fund Office does not receive a reply, we will continue to pay benefits by check in the mail.

The undersigned hereby authorizes the Carpenters Vacation, Holiday and Sick Leave Trust Fund for Northern California to make credit entries, and *if necessary, to make debit entries as adjustments for any credit in error*, to my bank account indicated below. I also authorize accordingly my financial institution indicated below to credit and/or debit the same to such account.

This authority is to remain in full force and effect until the Carpenters Vacation, Holiday and Sick Leave Trust Fund for Northern California has received written notification from me of its termination in such time and in such manner as to afford the Trust Fund Office and my Financial Institution a reasonable opportunity to act on it.

Authorization Information

I hereby authorize Carpenters Vacation, Holiday and Sick Leave Trust Fund for Northern California to directly deposit my benefit payments via electronic funds transfer into my checking **OR** savings account as indicated below:

Checking Account

Savings Account

(Please check only one option above.)

Account Number	Routing Number <small>(It may be necessary to contact your financial institution to obtain this number)</small>
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Signature

Printed Name

Date

Telephone Number

Social Security #, UBC # or CFAO#

Mailing Address

City

State

Zip Code

Email Address for receipt of Mandatory Disclosures. If you provide your email address, mandatory disclosures will be sent via email.*

PLEASE READ THIS CAREFULLY

All information on this form is required. The information is confidential and is needed to prove entitlement to payment. The information will be used to process payment data from the Carpenters Vacation, Holiday and Sick Leave Trust Fund to the financial institution and/or its agent. Failure to provide the requested information may affect the processing of this form and may delay or prevent the receipt of payments through the Direct Deposit/Electronic Funds Transfer Program.

Money deposited into incorrect accounts cannot be reissued until the funds are credited back to the Trust Fund.

CANCELLATION

The agreement represented by this authorization remains in effect until cancelled by the recipient by notice to the Carpenters Vacation, Holiday and Sick Leave Trust Fund.

CHANGING RECEIVING FINANCIAL INSTITUTIONS

The payee's Direct Deposit will continue to be received by the selected financial institution until the Carpenters Vacation, Holiday and Sick Leave Trust Fund for Northern California is notified by the payee that the payee wishes to change the financial institution receiving the Direct Deposit.

FALSE STATEMENTS OR FRAUDULENT CLAIMS

Federal law provides a fine of not more than \$10,000 or imprisonment for not more than five (5) years or both for presenting a false statement or making a fraudulent claim.

DELIVERY OF PLAN DOCUMENTS IS FAST, CONVENIENT, AND EFFICIENT!

- **Providing your email address for the receipt of mandatory disclosures is voluntary.**
- Electronic materials are emailed, typically in Portable Document Format (PDF), and are identical to the paper versions you've been receiving. There is no charge for accepting materials online.
- You will need an internet connection and a computer with an operating system capable of receiving, accessing and displaying and either printing or storing the electronic documents received. You should have Adobe Reader to access PDF files. Learn more and download Adobe Reader directly from Adobe's web site, www.adobe.com.
- Change your email address at any time by contacting the Fund Office at benefitservices@carpenterfunds.com, (510) 633-0333, or Toll-Free (888) 547-2054. The change must be in writing, with your signature.
- Some example documents that may be sent electronically include: Summary Plan Descriptions, Notices of Plan changes, Explanations of Benefits, Benefit and Claim Department letters, Prohibited Employment Committee letters, and Fund Trustee memos.
- Your consent to electronic delivery of Plan documents is valid unless and until you withdraw your consent. You can withdraw your consent and reset your preference to mail at any time by contacting the Fund Office at benefitservices@carpenterfunds.com, (510) 633-0333, or Toll-Free (888) 547-2054. The change must be in writing, with your signature.
- While e-Delivery may significantly reduce the amount of mail we send you, certain documents and service-related correspondence will continue to be sent via U.S. Mail. Additionally, you may request a paper copy of any documents received electronically.
- Unless otherwise instructed, your email address will be shared with the Carpenters Union, Apprenticeship Training Committee and the Carpenters Trust Funds.