



NEW PARTICIPANT BENEFITS CHECKLIST



New to the Union? Use this checklist to help get you started with Carpenter Funds benefits and guide you through the important early steps of your career.

COMPLETE AN ENROLLMENT FORM



- Obtain an Enrollment Form by calling 1(888) 547-2054 or visiting carpenterfunds.com
- Add all eligible dependents – Birth or Marriage Certificates required
- Choose Health Plan
- Name a Beneficiary

REGISTER FOR CFAO'S BENEFITS PORTAL

- Go to carpenterfunds.com & click the Login button to register
- Sign in at least once a month to review and track work hours
- Keep track of your Fund account balances
- Monitor your Health & Welfare eligibility
- Make updates to your account electronically



MANAGE YOUR VACATION, HOLIDAY AND SICK LEAVE ONLINE

Once you have registered for your CFAO Benefits Portal account:



- Sign up for Direct Deposit of your future Vacation, Holiday and Sick Leave Benefits (or request a form from the Fund Office)
- Check your Vacation Fund balance
- Request Rapid Pay Vacation, Holiday and Sick Leave withdrawals



**CARPENTER FUNDS ADMINISTRATIVE OFFICE
OF NORTHERN CALIFORNIA, INC.**

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