



## REEMPLOYMENT QUESTIONNAIRE

Company Name: \_\_\_\_\_

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

Company Phone: \_\_\_\_\_

Type of Industry: \_\_\_\_\_

(Examples: trucking, warehousing, moving and storage, food processing, brewery, bakery)

Job Title: \_\_\_\_\_

Describe your job duties: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Period of Employment:  From: \_\_\_\_\_ To: \_\_\_\_\_

This is potential future employment

Hours worked per week or month: \_\_\_\_\_

TEAMSTER Local Union, if any: \_\_\_\_\_

Did/do you have health and welfare benefits there?  Yes  No Current Age: \_\_\_\_\_

Type of work before retirement: \_\_\_\_\_

I certify that this information is true and correct to the best of my knowledge:

Name (print): \_\_\_\_\_ SS#: \_\_\_\_\_

Telephone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

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

<b>RESTRICTED REEMPLOYMENT</b>				
<b>Work <i>Inside</i> the Core Teamster Industries</b>		<b>Maximum Permissible Hours Per Month</b>		
<i>Work in <u>any</u> position (or supervising any position) in the following Core Teamster Industries, either in a union or non-union capacity, is Restricted Reemployment:</i>		Under Age 57	Age 57 - 59	Age 60-64
Trucking and Freight, Small Package and Parcel Delivery, Car Haul, Tank Haul, Warehouse, Food Processing or Distribution (including Grocery, Dairy, Bakery, Brewery and Soft Drink), Building Material and Construction.		<b>Not permissible unless reemployment meets one of the Exceptions below</b>		40 hours or * Unlimited
<b>Work <i>Outside</i> the Core Teamster Industries</b>		<b>Maximum Permissible Hours Per Month</b>		
<i>Work outside of Core Teamster Industries is Restricted Reemployment if the work falls into any of the following categories:</i>		Under Age 57	Age 57 - 59	Age 60-64
Work for a Contributing Employer or former Contributing Employer;		<b>Not permissible unless reemployment meets one of the Exceptions below</b>		40 hours or * Unlimited
Work in any position (or supervising any position) that is covered by a Teamster Contract with the Employer;				
Work in any position in the same industry in which you earned Contributory Credit with the Pension Fund; or				
Work in any position in the same job classification as other Plan Participants within a 100-mile radius.		80 hours	Unlimited hours	
<b>Governmental Employment Exception</b>		<b>Maximum Permissible Hours Per Month</b>		
Employed by a governmental agency provided the agency is not a Contributing Employer or a former Contributing Employer.		Unlimited hours		
<b>Newly Organized Company Exception</b>		<b>Maximum Permissible Hours Per Month</b>		
A retiree who is employed in what is not considered Restricted Reemployment, that subsequently becomes organized by the Teamsters (provided that the Employer does not become a Contributing Employer), will be allowed to continue employment without benefit suspension.		Unlimited hours		
<b>Previous Reemployment Rules Exception</b>		<b>Maximum Permissible Hours Per Month</b>		
These Restricted Reemployment Rules became effective on January 1, 2004. If the application of these rules results in a retiree being found to be in Restricted Reemployment based on employment that would not have been prohibited under the previous reemployment rules, the Fund will treat the position as not being Restricted Reemployment.		Refer to pre-2004 Reemployment Rules which can be found in the Pension Plan		

\* In August 2009, the Trustees approved a change to the reemployment rules which exempts **qualified retirees** age 65 or older from the Pension Fund's reemployment rules and allows them to work in any position for an unlimited number of hours.

**To qualify for the post-age 65 exemption to the Reemployment Rules**, a retiree must be age 65 or older, and been retired and receiving a pension benefit for at least 12 months, and:

- A. if the Retirement Date is before age 65, did not work in "Restricted Reemployment" for at least 12 consecutive months commencing at age 64 or later, or
- B. if the Retirement Date is at age 65 or older, did not work in "Restricted Reemployment" for any 12 consecutive month period that commences no earlier than 12 months preceding the Retirement Date.

Retirees who meet both conditions can work in any position for an unlimited number of hours and continue to receive their monthly pension benefit. If both of these conditions are not met, Reemployment is limited to 40 hours per month unless the Reemployment is not in the same trade or craft worked while covered by the Pension Fund or the Reemployment is outside the geographical area covered by the Pension Fund; if either is the case, an unlimited number of hours can be worked.

**Please contact the Fund to secure approval for this exemption.**

## **EXAMPLES OF GENERALLY PERMISSABLE REEMPLOYMENT**

The following examples of reemployment are generally permitted for 80 hours per month if you are 57-59 and for unlimited hours if you are 60 or older.

- Manufacturing work
- Office work
- Work for an airline
- Shuttle bus, motor coach or limo driver
- Local delivery of retail products via car or light truck (e.g., auto parts, prescriptions)

The following examples of work are generally permitted for an unlimited number of hours, regardless of age (***including before age 57***):

- Retail clerk (not in warehouse)
- Agricultural employment (but not including hauling products or supplies)
- Driver training for a school (but not a trucking company)
- Sales (non-driver)
- Government employment (any type of work provided the paycheck comes directly from a governmental entity)
- Work for a non-profit charity
- Restaurant
- Residential landscaping
- Residential construction
- Residential newspaper delivery

***Remember, in all cases, the reemployment cannot be Non-Permissible Core Teamster Work, work under a Teamster CBA, or work for a current or former Contributing Employer.***

## REEMPLOYMENT AND SUSPENSION OF BENEFITS RULES SUMMARY

- A. Restricted Reemployment rules effective August 1, 2009 - applicable to all Pensioners - are explained in the chart appearing on the back of this summary.
- B. A Pensioner under age 65 shall have his benefit payments (including Retiree Health and Welfare benefits for himself and his spouse, if applicable), permanently suspended for any calendar month in which he works in Restricted Reemployment in excess of those hours allowed under the Plan (as explained on the back of this summary).

A Pensioner age 65 or older may work in any position for an unlimited numbers if:

- 1) he has retired and receiving a pension benefit for at least 12 months, and
- 2) he has not worked in any "Restricted Reemployment" for at least 12 consecutive months immediately preceding age 65. If his retirement date is after age 65, 12 consecutive months immediately preceding the retirement date.

If the above conditions **have not** been met, a Pensioner age 65 or older shall have his benefit payments (including Retiree Health and Welfare benefits for his spouse, if applicable), permanently suspended for any calendar month in which he works in Restricted Reemployment in excess of those hours allowed under the Plan (as explained on the back of this summary); unless

- 1) he works less than 40 hours during the calendar month; or
- 2) his work is not in the "Same Trade or Craft" (as defined in (F) below) in which he was employed while earning Contributory Service Credit under this Pension Plan; or
- 3) his work is not in the same "Geographical Area covered by this Pension Plan" (as defined in (G), below).

- C. A Pensioner must promptly notify the Pension Fund if he returns to work in any capacity. The notice a Pensioner is required to furnish must provide the name, address and business activities of the employer for which he is working, the number of hours he works each month, the date he began his employment, the specific job duties he performs and whether his job duties, or the job duties of anyone he supervises, are covered by a Teamster contract. This information is necessary to help determine whether the benefit payments of the Pensioner are to be suspended because of his return to work. A Pensioner must also, upon request, certify in writing that he has not been working in any capacity which would result in the suspension of his benefit payments. If a Pensioner fails to furnish information related to his work or certify that he has not been working, his benefit payments shall be suspended unless and until he furnishes the required information.
- D. Any Pensioner who has had his benefit payments suspended shall not become eligible for resumption of his benefit payments unless and until he furnishes the Pension Fund with satisfactory notice that he has terminated the work which caused the suspension of his benefits.
- E. A Pensioner who has returned to work in Restricted Reemployment is obligated to reimburse the Pension Fund for all retirement pension payments he received for any month, or part of a month, in which he was reemployed.
- F. Same Trade or Craft means a job requiring either (1) the same services a Pensioner performed at any time in Contributory Service, or (2) services using the same skills a Pensioner learned while in Contributory Service, or (3) supervision of others performing the same services a Pensioner performed at any time in Contributory Service.
- G. Geographical Area covered by this Pension Plan is determined as of the date the benefit payments of Pensioner begin and means every state in which Employees work in Covered Service.