

DIRECT DEPOSIT AUTHORIZATION FORM

Instructions for completing Direct Deposit Form

1. All sections must be completed, and all sections requiring a signature **must** be signed.
2. Make sure to indicate whether you have a savings, checking, or reloadable card.
3. If using a reloadable card, contact the card service provider for the account number and routing number (this is not the number on the face of your card).
4. If you fax or email your form, please call to confirm receipt of your form.

Retiree / Beneficiary Name: _____ Social Security Number: _____

Telephone Number: _____ Email Address: _____

(Area Code)

Name of Bank: _____

Account Type: Checking Savings Reloadable card

**Attach copy of a
voided check here:**

Ownership of Account: Self Joint

Account Number: _____

ABA # (routing): _____

Please return this form with a **void check** directly to the address or fax number listed below.

By signing this agreement, I authorize the Sheet Metal Workers' National Pension Fund (the "Fund") to initiate credit entries to the account listed above for receiving my benefits and to debit such account for entries or adjustments for any credit entries made in error. *Additionally, if the Fund remits payments to my account after my death, I hereby authorize the financial institution listed above to provide to the Fund information concerning these payments, the status of the account (open or closed), and persons with access to the account. Such authorization constitutes an exception as described in 15 USC 6802(e)(2) and authorization to release such information pursuant to the financial institution's privacy policy.*

Signature: _____ Date: _____

If the account is a joint account - that individual **must** also sign to indicate agreement with the statement above.

Signature: _____ Date: _____

Print name of Joint Account Holder: _____

Check here if you wish to receive a monthly voucher.

****NOTE: This may take up to 6 weeks to be effective. Please be advised that checks will be sent to the home mailing address currently on file with the Fund until the direct deposit processes. If you wish to make changes in your address or tax withholdings please contact the Fund Office for additional information.**

*****Effective January 1, 2024, the National Pension Fund will no longer provide state income tax withholding except for the Commonwealth of Virginia, which is where the Fund is administered. If you have any questions about how this change may affect you, you should seek assistance from a qualified tax advisor or your state's Department of Taxation. This change will not affect your current federal withholding*****

SHEET METAL WORKERS' NATIONAL PENSION FUND

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