



Carpenters Southwest Administrative Corporation

533 South Fremont Avenue • Los Angeles, California 90071-1706 • Tel: 213-386-8590 • Toll Free: 800-293-1370

www.carpenterssw.org

DATE: December 13, 2018

TO: All Participants of the Southwest Regional Council of Carpenters / New Mexico Retirement Plan

RE: Carpenters Southwest Administrative Corporation is Your New Pension Plan Administrator

As previously announced, effective 11:59 p.m. on December 31, 2018, the Southwest Regional Council of Carpenters / New Mexico Retirement Fund ("New Mexico Fund") will merge into the Southwest Carpenters Pension Fund ("Southwest Fund").

Beginning January 1, 2019, the Administrative Office for your pension benefits will be:

Carpenters Southwest Administrative Corporation ("CSAC")

533 South Fremont Avenue
Los Angeles, CA 90071-1706
(213) 386-8590
(800) 293-1370 (toll-free)

Call Center Hours of Operation:

9:00 a.m. - 4:00 p.m. (Mountain) 8:00 a.m. to 5:00 p.m. (Pacific)

www.carpenterssw.org

In addition to the Southwest Carpenters Pension Fund, CSAC currently handles the administration of your Health and Welfare and Vacation Trust benefits. Going forward, you can contact CSAC for assistance with questions about your New Mexico Retirement Plan pension benefits, including applying for retirement benefits, estimating your pension benefit, updating your beneficiary, obtaining Plan documents, and much more. Spanish-speaking representatives are also available to assist you.

Information Available Online

On the CSAC website, you can access general information such as forms, announcements and Plan information via www.carpenterssw.org. Starting January 1, 2019, you will be able to view your personal pension benefits online through the MemberXG portal. On the site, you will be able to see your individual work history, pension information, health plan eligibility information and more. You can specify if you would like to view information in English or Spanish when you first set up your account, although not every document is available in Spanish.

To get started with MemberXG, visit the link below and follow the directions provided in the attached document for creating your personal account.

- **MemberXG link:** <https://memberxg.gobasys.com/csac/main/#!/account/login>

Changes You Can Expect with Your New Plan Administrator

- Retirement Application Processing – Processing time will be approximately 60 days from receipt of your application, assuming all required information is provided timely.
- Your Pension Plan information will be available online starting January 1, 2019.
- Telephone support is available in English and Spanish.
- If you are currently retired and have New Mexico state taxes withheld from your monthly benefits, effective January 1, 2019, those state withholdings will no longer be deducted from your benefits.
- Annual affidavits will be required only for pensioners age 65 or under instead of all pensioners.

For your reference, we have included a list of *Frequently Asked Questions* (FAQs). These FAQs, previously sent to Plan Participants, address questions relative to the Plan merger. An updated *Summary Plan Description* (SPD) will be mailed to eligible Plan Participants in the coming weeks.

CSAC looks forward to servicing all your benefit needs. If you have questions regarding your benefits, you can email us at info@carpenterssw.org with “New Mexico” in the subject line or you can call (800) 293-1370 and ask to speak to a Pension Department representative.

Sincerely,



Daniel Vela
Pension and Annuity Plans Manager