



**CARPENTERS
SOUTHWEST
ADMINISTRATIVE
CORPORATION**

533 South Fremont Avenue
Los Angeles, CA 90071-1706

Tel: 213-386-8590 • **Toll Free:** 800-293-1370

www.carpenterssw.org

DATE: October 15, 2021

TO: All Participants of the Arizona State Carpenters Pension Trust Fund

RE: Carpenters Southwest Administrative Corporation (CSAC) - Your New Pension Plan Administrator

As previously announced by the Trustees of the Arizona State Carpenters Pension Trust Fund (“Arizona Plan”), effective December 31, 2021, at 11:59 p.m. Pacific Standard Time, the Pension Plan of the Arizona State Carpenters Pension Trust Fund will merge into the Southwest Carpenters Pension Plan (“Southwest Plan”).

Beginning January 1, 2022, 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:

8:00 a.m. to 5:00 p.m. (Pacific)

carpenterssw.org

CSAC is the Administrator of benefits for Carpenters in the Southwest Regional Council, including the Southwest Carpenters Pension Plan. Beginning December 9, 2021, you can contact CSAC for assistance with questions about your Arizona State Carpenters’ Trust Pension Plan or the Southwest Carpenters Pension Plan. This includes: applying for retirement benefits, estimating your pension benefit, updating your beneficiary information, obtaining Plan documents, and much more. Spanish-speaking representatives are also available to assist you.

What You Can Expect from Your New Plan Administrator

- Retirement Application Processing – Processing time will be approximately 90 days from receipt of your application and all required documents.
- Your Pension Plan information will be available online in MemberXG starting January 1, 2022.
- Telephone support is available in English and Spanish.
- If you are currently retired, you will continue to receive your monthly pension benefit in the same manner.

- If you are currently retired and have state taxes withheld from your monthly benefits, effective January 1, 2022, those state withholdings will no longer be deducted from your benefits.
- Retirees under age 65 must verify that they have not engaged in Prohibited Employment each year by providing a copy of their Federal tax filing.
- Retirees age 65 or older or their beneficiaries must submit an annual notarized affidavit to confirm receipt of pension benefits.

Information Available Online

You can access general information such as forms, announcements, and Plan information on the Retirement page of our website at carpenterssw.org.

Your personal information regarding Pension Credits and Pension Payments will be available online through the MemberXG portal. To get started with MemberXG after January 1, 2022, visit memberxg.carpenterssw.org for information and instructions for creating your account. You can set your language preference to English or Spanish on the home screen, although some documents are only available in English.

Deadlines for Applying for a Pension

As previously communicated, Zenith-American Solutions will process retiree applications received by October 1, 2021. Applications received after this date will be processed by CSAC with the first payment, including any retroactive periods, on February 1, 2022.

Summary Plan Description

An updated *Summary Plan Description* (SPD) will be sent by mail to eligible Plan Participants in the coming weeks. You may also refer to the announcement sent from the Arizona State Carpenters' Trust Pension Plan Trustees in late September for details around the various plan provisions and preservation of your pre-merger accrued benefits.

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