SOUTHWEST CARPENTERS TRUSTS ENROLLMENT FORM

533 S. FREMONT AVENUE, LOS ANGELES, CA 90071
EMAIL TO: ENROLLMENT@CARPENTERSSW.ORG
FAX TO: (213) 739 - 9437

Directions: Complete this form upon Enrollment in the Plans administered by CSAC or use this form to update your record.

CHECK ONE	New Participant?		Updating Your Record?	

PARTICIPANT INFORMATION

Social Security Number	Date of Birth (MM/DD/YYYY)	Are you Retired? (Check One)	Yes	No
Last Name	First Name		MI	
Street Address	City	State	Zip Code	
Local Union #	Initiation Date	Sex (Check One)	M	F
Email Address	Phone #			

Check One				
Yes		No		I consent to receive electronic delivery of Plan documents by email or text message.

In the event the Administrative Office is unable to locate you to distribute benefits, please provide the name and contact information for a person who does not live with you that would help the Administrative Office locate you.

Name	Relation
Email Address	Phone Number

Electronic Delivery of Plan Correspondence

As a participant, you are entitled to important materials explaining how your various benefits work. You have the option to receive this information electronically by email. Electronic documents or a link to a document in PDF format may be emailed to the address you provided. The PDF version of the document is identical to the paper version you would otherwise receive in the mail.

You may also receive important alerts regarding your plan benefits via text messaging.

The delivery of documents to you by email may reduce the amount of mail you receive from the Administrative Office. However, certain documents and service-related correspondence may continue to be sent via U.S. Mail.

- Your consent to receive electronic delivery of Plan documents is valid unless and until you withdraw your consent in writing. You can opt out of electronic delivery at any time or change your email address and phone number by contacting the Administrative Office.
- You have the right to request hard copies of documents pursuant to ERISA section 104(b)(4). Send an email to info@carpenterssw.org or call (800) 293-1370 to request a hard copy of a document.
- If you have difficulty accessing any document, please contact the Administrative Office at info@carpenterssw.org or call (800) 293-1370. Many of the Trust Funds documents are also available on the CSAC website (www.carpenterssw.org). Please note that documents posted to the CSAC website may be taken down after one year or earlier if they are superseded by a new version.
- Standard message rates and data charges from the subscriber's carrier could apply when sending and/or receiving text messages.
- You may opt out of electronic delivery or change your contact information by submitting a new, signed form by:
  - Email to: enrollment@carpenterssw.org
  - Mail to: Southwest Carpenters Trust
    533 S. Fremont Avenue, 6th Floor
    Los Angeles, CA 90071

Signature _____ Date _____

Last Name	First Name	MI	Social Security Number

BENEFICIARY DESIGNATION*

Primary Beneficiary(ies)

List the person(s) who should receive your Life Insurance Benefit from the Health & Welfare Plan and your Vacation balance in the event of your death. If you are not married, this form will also apply to any earned Pension and/or Annuity benefit upon your death.

Name	Relationship	Social Security Number	Benefit %
Address		Phone Number	Date of Birth
Name	Relationship	Social Security Number	Benefit %
Address		Phone Number	Date of Birth
Name	Relationship	Social Security Number	Benefit %
Address		Phone Number	Date of Birth

Secondary Beneficiary(ies)

Secondary Beneficiaries will be paid in the event that all Primary Beneficiary(ies) are deceased at the time of your death or the Administrative Office is unable to locate your Primary Beneficiary(ies).

Name	Relationship	Social Security Number	Benefit %
Address		Phone Number	Date of Birth
Name	Relationship	Social Security Number	Benefit %
Address		Phone Number	Date of Birth

Subject to the terms of the Trust Agreements for the Southwest Carpenters Health and Welfare Trust, the Southwest Carpenters Vacation Trust, the Southwest Carpenters Pension Trust and the Southwest Carpenters Annuity Trust, I request that any sum becoming payable to a beneficiary under said Trusts upon my death be payable to the beneficiaries listed above. I hereby revoke all designations of beneficiaries previously made by me under said Trusts.

Note: Plan rules dictate that your legal spouse will automatically be considered your Beneficiary for benefits from the Southwest Carpenters Pension Trust and that your legal spouse must consent in writing to the designation of a Beneficiary other than your spouse for the Southwest Carpenters Annuity Trust. Consult the Summary Plan Description (SPD) for more information on life insurance and/or survivor benefits for each Trust.

*** To add additional beneficiaries, to designate alternative beneficiaries by Fund and/or designate a Southwest Carpenters Annuity Trust beneficiary other than your spouse please go to www.carpenterssw.org to download Beneficiary Designation Form by Trust Fund. For assistance contact the Administrative Office at (213) 386-8590 or (800) 293-1370.**

Signature	Date

SOUTHWEST CARPENTERS HEALTH & WELFARE TRUST
HEALTH CARE ENROLLMENT

Social Security Number	Date of Birth (MM/DD/YYYY)	Gender (Choose One)	M	F

Last Name	First Name	MI

Street Address	City	State	Zip Code

☐	Single		
☐	Married	Date of Marriage	
☐	Separated	Date of Separation	
☐	Divorced	Date of Dissolution	
☐	Domestic Partnership	Date of Domestic Partner Registration	
☐	Widowed	Date of Death of Spouse	

You must remove your ex-spouse or domestic partner (and any step children) within 30 days of your divorce or dissolution of your domestic partnership.

(WA Registered Domestic Partners are treated the same as Spouse)

SOUTHWEST CARPENTERS HEALTH & WELFARE PLAN SELECTION

Coverage is subject to the health plan eligibility rules and the applicable labor agreement.

ACTIVE MEDICAL PLAN

Select your Medical Plan
Enrollment includes eligible dependents at no cost to you.
*****Dental and Vision plans are included in coverage.*****

(CHOOSE ONE)

◯ **SOUTHWEST CARPENTERS MEDICAL PPO PLAN**
(Available in all States)

◯ **KAISER PERMANENTE PLAN**
(Available in CA, CO, OR, and WA)
Must reside in KP service area.

BRONZE MEDICAL PLAN

Medical coverage only, no dental or vision.

Offered only by Agreement in AZ, CO, NM, UT, MT. **Making changes between the Active and Bronze Medical Plans may result in a change to your base pay rate.**

Apprentices default to the Bronze Plan by agreement:
AZ & CA - 1st & 2nd period / NV - 1st through 3rd period
(Millwrights excluded)

Dependents may be added with a monthly self-payment:
1 - dependent =$150 per month
2 - or more dependents =$250 per month

◯ **SELECT THE BRONZE MEDICAL PPO PLAN**

ENROLLING DEPENDENTS*

Spouse or Domestic Pt.	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		
Dependent Child #1	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		
Dependent Child #2	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		
Dependent Child #3	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		
Dependent Child #4	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		
Dependent Child #5	Add ☐ Remove ☐	Social Security Number	Date of Birth			
Last Name	First Name	MI	Gender	Male ☐ Female ☐		

Please sign reverse page and return the completed form to enrollment@carpenterssw.org

Last Name	First Name	MI	Social Security Number

To complete enrollment of your spouse/domestic partner and/or dependents, the following documents must be provided:

- Copy of Certified Marriage Certificate and your most recent tax return to enroll your spouse
- Copy of a Domestic Partnership Registration from a Government Agency and the Domestic Partner Enrollment Affidavit to enroll a Domestic Partner
- Copy of Certified Birth Certificate, Legal Guardianship, or Adoption Decree to enroll a dependent child

I hereby declare that all the statements made on the previous page are, to the best of my knowledge and belief, true and complete and that they are the basis on which insurance coverage may be issued. I agree on behalf of myself and the dependents listed that we are subject to the provisions of the applicable Summary Plan Description and all plan documents.

I understand that the Dental benefit plan I have selected provides reimbursement for certain Dental costs which are more fully described in the current Certificates of Coverage. I understand there may be instances where treatment decisions made by my Dentist, provider or me for Dental expenses which I have incurred may not be covered by my Dental benefit plan. The Certificates provide Dental benefits only. Review your Certificates carefully.

"It is a crime to knowingly provide false, incomplete, or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits."

FRAUD WARNING NOTICE: Providing false, incomplete or misleading information for any insurance policy shall not bar the right to recovery unless the statement was made with the actual intent to deceive, or it materially affects the acceptance of the risk or the hazard assumed by the insurers.

Kaiser Plans in the NW and WA are offered by:

Kaiser Foundation Health Plan of Washington
2715 Naches Ave. SW, Renton, WA 98057

Kaiser Foundation Health Plan of the Northwest
500 NE Multnomah St., Suite 100, Portland, OR 97232-2023

California law prohibits any HIV test from being required or used by health insurance companies as a condition of obtaining health insurance coverage.

Signature	***Date***

Kaiser Foundation Health Plan, Inc., Arbitration Agreement*

I understand that (except for Small Claims Court cases, claims subject to a Medicare appeals procedure or the ERISA claims procedure regulation, and any other claims that cannot be subject to binding arbitration under governing law) any dispute between myself, my heirs, relatives, or other associated parties on the one hand and Kaiser Foundation Health Plan, Inc. (KFHP), any contracted health care providers, administrators, or other associated parties on the other hand, for alleged violation of any duty arising out of or related to membership in KFHP, including any claim for medical or hospital malpractice (a claim that medical services were unnecessary or unauthorized or were improperly, negligently, or incompetently rendered), for premises liability, or relating to the coverage for, or delivery of, services or items, irrespective of legal theory, must be decided by binding arbitration under California law and not by lawsuit or resort to court process, except as applicable law provides for judicial review of arbitration proceedings. I agree to give up our right to a jury trial and accept the use of binding arbitration. I understand that the full arbitration provision is contained in the Evidence of Coverage.

Signature	***Date***

** Disputes arising from the following fully-insured Kaiser Permanente Insurance Company coverages are not subject to binding arbitration: 1) the Preferred Provider Organization (PPO) and the Out-of-Network portion of the Point-of-Service (POS) plans; 2) Preferred Provider Organization (PPO) plans; 3) Out-of-Area Indemnity (OOA) plans; and 4) KPIC Dental plans.*

***Dependent Eligibility**

- Dependents are not required to reside with the subscriber.
- Dependents are not required to be dependent upon the subscriber for support.
- Eligibility for medical assistance is not considered when determining eligibility for coverage or making payments.
- Dependent children are eligible for coverage through the age of 25 regardless of marital status, or eligibility for coverage under another plan.

If children of the primary insured are covered, children of Domestic Partners are eligible for coverage on the same basis.