



OE3 Trust Funds

Health. Security. Service.

Operating Engineers Trust Funds
PO Box 23190, Oakland, CA 94623-0190

P 800-251-5014 • F 510-545-4937 • www.oe3trustfunds.org

PENSION BENEFIT ELECTRONIC FUND TRANSFER REQUEST

- You may enclose a **voided check** for checking accounts **OR** a **savings deposit slip** for savings accounts (please check correct routing number as deposit slips sometimes route differently than checks). FAX 510-545-4937
- This form **MUST** be **signed and dated**.
- It may take up to 4-6 weeks to process your EFT, during which time your check will be sent to your home address.
- Please be advised that this office **cannot** send funds to foreign banks.

If you have any questions, please contact the Trust Fund Office at the phone number indicated above.

Name: _____ Social Security Number: _____

Address: _____

Telephone Number: _____ Check this box if address is new: ☐

Signature: _____ Date: _____

Check this box if you do not want direct deposit and want a check mailed to the address noted above: ☐

As benefit payments become due me from the Pension Plan, I authorize the Pension Plan Administrative Office to pay by directing the electronic transfer of funds, (or if not available, by direct mail of a check) to the order of the mentioned below financial institution for credit to my account. I authorize said financial institution to refund an amount equal to any payments which become due after my death that have been credited to my account or to charge the account accordingly. I reserve the right to cancel this authorization and direction by giving written notice to the Pension Plan Administrative Office.
I will notify the Pension Plan Administrative Office in writing regarding a change in permanent residence and advise, at that time, if checks are to continue to be sent to the financial institution named below.

Joe Smith 1234 Anystreet Court Anycity, AA 12345		1234
Pay to the order of _____		
_____ Dollars		
Bank Anywhere		
123456789	123456789123	1234

Routing
Number

Account
Number

Check
Number

ACCOUNT INFORMATION

SELECT ONE: ☐ Checking Account **OR** ☐ Savings Account

Bank Name: _____ Bank Phone Number: _____

Branch Address: _____

Routing Number: _____ Account Number: _____