

# Mid-America Carpenters Regional Benefit Services

## Retirement Checklist



Are you considering retirement? Review the checklist below to make sure there are no loose ends when you're ready to hang up your toolbelt or begin drawing your retirement benefits.

### Pension

Contact your Pension Office to begin the retirement process. If you are unsure which pension plan you participate in, contact your Local Representative.

Carpenters Pension Trust Fund of St. Louis  
1419 Hampton Ave, St. Louis, MO 63139  
314.644.4802, # 2 OR 877.232.3863, #2

Carpenters Pension Fund of Kansas City  
8955 East 38<sup>th</sup> Terr, Kansas City, MO 64129  
314.644.4802, #2 OR 816.931.3414

Carpenters Pension Fund of Illinois (Geneva)  
1431 Opus Pl, Ste 350, Downers Grove, IL 60515  
800.448.5825

Kansas Building Trades Open End Pension Fund  
4101 Southgate Drive, Topeka, KS 66609  
785.267.0140

### Annuity

Contact the Annuity Plan to learn more about your annuity benefits and when you can begin drawing them.

St. Louis – Kansas City Carpenters Regional Annuity Plan  
1419 Hampton Ave, St. Louis, MO 63139  
314.644.4802, # 2 OR 877.232.3863, #2

### Union

Determine if you plan to continue working. Notify your Central Dues office.

St. Louis Central Dues Office: 314.644.7200

Kansas City Central Dues Office: 816.931.7265

When you retire, you may:

- a. Begin to pay your Window Dues at a reduced Retired rate.
- b. Begin to have your Window Dues deducted from your Pension benefit automatically monthly (St. Louis and Kansas City only). You will need to complete a Dues Authorization Form in the St. Louis Pension Office to begin this process.

### Health and Welfare<sup>1</sup>

If you have health coverage, call 314.644.4802, #1 to talk with a Participant Service Representative.

- a. Determine when your health coverage ends.
- b. Go through your options to continue coverage through Carpenters or the process of selecting other coverage.

<sup>1</sup>Understand you must continue paying your union Window Dues to continue health coverage under the plan. This includes continuing coverage under the Non-Active provisions of the plan or to be eligible for Medicare Supplement coverage through UnitedHealthcare's Group Medicare Advantage program.