



# OE3 Trust Funds

Health. Security. Service.

Operating Engineers Trust Funds  
1600 Harbor Bay Parkway, Suite 200  
Alameda CA 94502-3035

(800) 844-8392 • (800) 251-5013 • 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).
- 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:

Joe Smith 1234  
1234 Anystreet Court  
Anycity, AA 12345

Pay to the order of \_\_\_\_\_  
\_\_\_\_\_ Dollars

Bank Anywhere  
|| 123456789 || 123456789123 || 1234

Routing  
Number

Account  
Number

Check  
Number

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 above-named 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 above.

## ACCOUNT INFORMATION

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

Bank Name: \_\_\_\_\_ Bank Phone Number: \_\_\_\_\_

Branch Address: \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_