

I.B.E.W. DISTRICT NO. 9 PENSION PLAN

Administered by Joseph H. Herrle & Associates, Inc.

RESOURCE / INFORMATION CONTACTS

Plan Administrative Office

Joseph H. Herrle & Associates, Inc.
P.O. Box 1509
Portland, OR 97207-1509

Telephone: (503) 221-1395
Toll Free: 1-800-804-2385
Facsimile : (503) 221-1591

The Plan Administrative Office can assist you with –

General Information About the Plan, including:

- Enrollment
- Vesting
- Available Investment Options
- Beneficiary Designation
- Current Account Value
- Eligibility to Receive a Distribution of Funds
- Retirement Benefit Options and Estimates
- Reciprocity to or from the Plan
- Employer Contribution History Reports
- Effect of a Divorce or Marriage on Benefits
- Qualified Domestic Relations Orders
- Answers to frequently asked questions

Forms or Materials to Facilitate:

- Enrollment
- Beneficiary Designation
- Change of Designated Beneficiary
- Current Investment Performance Info.
- Request for Retirement Benefits
- Request for Cash Distribution forms
- Request for Direct Rollover forms
- Annuity Distribution Application forms
- Model Qualified Domestic Relations Order
- Instructions for accessing Account and Information via Principal Financial Group's toll-free phone system or website
- Assistance in completing forms

The Plan's Investment Manager / Recordkeeper

Principal Financial Group

Telephone: 1-800-547-7754
Website: www.principal.com
Plan Account / Contract #: 3-54801

The Principal Financial Group can assist you with -

- View or listen to daily account values
- Change your investment direction for current account or future contributions
- Investment account options within the Plan
- Online Account and Information Access
- Obtain your on-line Plan statement
- Obtain investment performance information
- View tips to help find the investment risk that's right for you
- Obtain Annuity Benefit Estimates
- Obtain Benefit Estimates under Plan's Fully Flexible Distribution Option
- General tax information in regard to Distribution of Benefits
- On Line Access to a Beneficiary Designation form