NAME: **SS#:**

Warehouse Employees Union Local No. 730 Pension Trust Fund

EMPLOYER: Grand Union

LOCAL: 730
STATUS: Retired, September 1, 2002

ISSUE: Pension – Additional Pension Benefit #P13/129-5532

FUND RULE:
"Eligibility
Generally, you become eligible to participate in the Plan by working at jobs covered by a collective bargaining agreement between Local 730 and a participating employer, where the agreement requires the employer to make contributions to the Fund on your behalf."
(Warehouse Employees Union Local No. 730 Pension Trust Fund SPD, page 9)

SUMMARY: Appeal Received: June 19, 2013

The **participant** is appealing to request additional Pension credit for the years he was employed by Virginia Paper Company (1968-1970).

Fund records indicate the participant inquired about his pension credits in October of 1998. After a review of the participant's file, a letter was mailed to the participant on December 3, 1998 advising that he had 13 years of credited vesting service and that a benefit of $313.74 would be payable the month following his 60th birthday. A completed Pension application was received on August 31, 2002, and payment of the participant's Pension benefit commenced on October 1, 2002, with a retroactively effective date of September 1, 2002.

Fund records further indicate that a copy of the participant's Social Security statement was received in October of 2007, with a request from the participant for a "re-check" of his credited service. A letter was mailed to the participant on October 9, 2007, advising that his credited service was reviewed and confirmed (13 years total). A copy the participant's detailed Social Security earnings for the years 1978 through 1981 was received by fax on December 28, 2007. When the participant called the Fund office on January 28, 2008, he asked why he did not get credit for the years 1967 through 1970. A letter was mailed to the participant on January 31, 2008, advising that after a review of the detailed Social Security statement (1978-1981), his credited service was again confirmed (13 years total). The participant was further advised that a detailed Social Security statement was not received for the years from 1967 through 1970 and Fund records did not indicate that he was employed by a participating employer under the Fund during that period of time. A copy of the participant's detailed Social Security statement (for years 1968-1981) was received on April 21, 2008. The statement confirmed that the participant was employed by Virginia Paper Company from 1968 through 1970. The participant was advised that Virginia Paper Company was not a participating employer.

Fund records further indicate that the participant called again on January 25, 2013 to inquire about his pension credit and was advised that detailed Social Security records (previously received) matched his 13 years of credited service. A letter was received from the participant on January 31, 2013, again asking for a review of his pension credit. After the participant's file and historical employer documents were reviewed, the Fund office called the participant on May 13, 2013 to reconfirm his 13 years of credited service. When the participant's spouse called on June 19, 2013 still questioning the participant's pension credit, she was advised that the participant's January 31, 2013 letter would be presented to the Board of Trustees as an appeal.

It was noted that Virginia Paper Company was acquired by Zellerbach Corporation in 1978 (Zellerbach Corporation's effective date with Local 730 was 1970). Therefore, the participant's employment with Virginia Paper Company from 1968-1970 cannot be included in his credited vesting service under the Fund.

ACTION: **Approved** ☐ **Denied** ☐ **Tabled** ☐