

Participation Agreement Instructions

Complete the Participation Agreements (2 copies).

Select the type of Participation Agreement you wish to enter into (either All of Alumni).

Have an authorized representative of your company sign both copies of the Participation Agreement.

Return **both** signed copies of the agreement to our office.

We will obtain signature on behalf of the NEBF and will return one fully executed original to you for your records.

Complete the form to provide us with the names, Social Security numbers and job classifications of all non-bargaining unit employees to be contributed upon.

Please be sure that you received your signed Participation Agreement back from the Fund office before you begin reporting and contributing on your non-bargaining employees.

To help you better understand how to report non-bargaining unit employees, see the Reporting Procedures for Non-Bargaining Unit Employees.

If you have any questions or need more information, please contact the Fund office via e-mail by clicking on "Contact Us" located on the top right of the website.



NEBF PARTICIPATION AGREEMENT FOR RELATED ORGANIZATIONS

Between Employer Name: _____, Federal Registration Number: _____ Effective: _____
(hereinafter "Related Organization") and the National Electrical Benefit Fund (hereinafter "NEBF") (Month/Year)

Section 6.3.2 of the NEBF's Restated Employees Benefit Agreement and Trust (hereinafter "Restated Agreement") permits certain Related Organizations to make contributions to the NEBF on behalf of their employees.

Section 6.3.3(a) provides that such a Related Organization who desires to contribute on behalf of its employees shall execute a written Participation Agreement which binds the Related Organization to the terms of the Restated Agreement, thereby specifying the detailed basis upon which the contributions are to be made to the NEBF.

The Related Organization hereby agrees to make payments to the NEBF on behalf of either 1) *all* of its non-bargaining unit employees or 2) each and every employee who meets the following conditions: the employee has earned at least one benefit service credit as defined in the "Plan of Benefits for the NEBF" and, during the current plan year or a prior plan year, at least one-half (1/2) of the employee's total hours of service for that year with any and all Related Organizations were performed in an IBEW or IBEW Local Union bargaining unit ("alumni coverage"), except with regard to both 1) and 2) above, contributions need not be made on behalf of employees who are included in another unit of employees covered by a collective bargaining agreement with a labor union, if retirement benefits were the subject of good faith bargaining between such Related Organization and the labor union. The Related Organization hereby agrees to make contributions on (check one of the following):

- _____ - **All of its non-bargaining unit employees.**
- _____ - **Its "alumni" non-bargaining employees only.**

The Related Organization must execute a new participation agreement if it wishes to change to the other type of non-bargaining unit coverage.

The amount to be contributed to the NEBF on behalf of each non-bargaining unit employee under this Participation Agreement shall be 3% of the gross labor payroll paid to, accrued by, the employee. 3% of the gross labor payroll shall mean either a) 3% of all wages and other compensation which the Related Organization would pay, or which the employee would accrue, if the employee were receiving the wage rate received by the highest number of employees in the appropriate IBEW bargaining unit and working the normal straight time hours provided for in the appropriate IBEW labor agreement, or b) 3% of all wages and other compensation paid to, or accrued by, the employee for services performed for the Related Organization, if such amount is less than in a).

The Related Organization hereby agrees to make contributions to the NEBF's local collection agent or to such depository as the Trustees of the NEBF shall designate, only by check or bank draft, made payable to the order of the NEBF, or such other method of transmitting money as the Trustees may permit. All contributions shall become a debt due and owing the NEBF on the last day of each month.

The Related Organization hereby acknowledges receipt of a copy of the Restated Agreement and agrees to be bound by all terms and conditions of said Restated Agreement (including, but not limited to, provisions relating to the production of records, tax qualification related coverage/participation requirements, and the collection and enforcement of payments) and such Restated Agreement as amended from time to time.

In consideration of the Participation Agreement, the NEBF agrees to accept said Related Organization as a contributing employer to the NEBF.

This Participation Agreement shall be binding upon and shall inure to the benefit of the heirs, successors, and assigns of the respective parties hereto.

This Participation Agreement will expire as of the date the Related Organization ceases to be obligated to contribute on behalf of IBEW represented employees or ceases to be eligible to contribute pursuant to Section 6.3.2 of the Restated Agreement, or as of the date the Related Organization determines that it no longer desires to make payments in accordance with Section 6.3.2 of the Restated Agreement. In any such event, the Related Organization shall give the NEBF at least thirty (30) days written notification of the cessation of contributions and the Related Organization shall give written notification to all employees and former employees (who had previously been contributed upon) that contributions have ceased. The NEBF shall be furnished with a copy of each such notification.

This Participation Agreement may be terminated by the NEBF if the Related Organization fails substantially to comply with the terms of this Participation Agreement or the terms of the Restated Agreement.

Related Organization _____
Name of Organization

Date: _____ By: _____
Name and Title

Signature

National Electrical Benefit Fund

Date: _____ By: _____
Michael J. Reed
Assistant Administrator and Controller



NEBF PARTICIPATION AGREEMENT FOR RELATED ORGANIZATIONS

Between Employer Name: _____, Federal Registration Number: _____ Effective: _____
(hereinafter "Related Organization") and the National Electrical Benefit Fund (hereinafter "NEBF") (Month/Year)

Section 6.3.2 of the NEBF's Restated Employees Benefit Agreement and Trust (hereinafter "Restated Agreement") permits certain Related Organizations to make contributions to the NEBF on behalf of their employees.

Section 6.3.3(a) provides that such a Related Organization who desires to contribute on behalf of its employees shall execute a written Participation Agreement which binds the Related Organization to the terms of the Restated Agreement, thereby specifying the detailed basis upon which the contributions are to be made to the NEBF.

The Related Organization hereby agrees to make payments to the NEBF on behalf of either 1) *all* of its non-bargaining unit employees or 2) each and every employee who meets the following conditions: the employee has earned at least one benefit service credit as defined in the "Plan of Benefits for the NEBF" and, during the current plan year or a prior plan year, at least one-half (1/2) of the employee's total hours of service for that year with any and all Related Organizations were performed in an IBEW or IBEW Local Union bargaining unit ("alumni coverage"), except with regard to both 1) and 2) above, contributions need not be made on behalf of employees who are included in another unit of employees covered by a collective bargaining agreement with a labor union, if retirement benefits were the subject of good faith bargaining between such Related Organization and the labor union. The Related Organization hereby agrees to make contributions on (check one of the following):

- _____ - **All of its non-bargaining unit employees.**
- _____ - **Its "alumni" non-bargaining employees only.**

The Related Organization must execute a new participation agreement if it wishes to change to the other type of non-bargaining unit coverage.

The amount to be contributed to the NEBF on behalf of each non-bargaining unit employee under this Participation Agreement shall be 3% of the gross labor payroll paid to, accrued by, the employee. 3% of the gross labor payroll shall mean either a) 3% of all wages and other compensation which the Related Organization would pay, or which the employee would accrue, if the employee were receiving the wage rate received by the highest number of employees in the appropriate IBEW bargaining unit and working the normal straight time hours provided for in the appropriate IBEW labor agreement, or b) 3% of all wages and other compensation paid to, or accrued by, the employee for services performed for the Related Organization, if such amount is less than in a).

The Related Organization hereby agrees to make contributions to the NEBF's local collection agent or to such depository as the Trustees of the NEBF shall designate, only by check or bank draft, made payable to the order of the NEBF, or such other method of transmitting money as the Trustees may permit. All contributions shall become a debt due and owing the NEBF on the last day of each month.

The Related Organization hereby acknowledges receipt of a copy of the Restated Agreement and agrees to be bound by all terms and conditions of said Restated Agreement (including, but not limited to, provisions relating to the production of records, tax qualification related coverage/participation requirements, and the collection and enforcement of payments) and such Restated Agreement as amended from time to time.

In consideration of the Participation Agreement, the NEBF agrees to accept said Related Organization as a contributing employer to the NEBF.

This Participation Agreement shall be binding upon and shall inure to the benefit of the heirs, successors, and assigns of the respective parties hereto.

This Participation Agreement will expire as of the date the Related Organization ceases to be obligated to contribute on behalf of IBEW represented employees or ceases to be eligible to contribute pursuant to Section 6.3.2 of the Restated Agreement, or as of the date the Related Organization determines that it no longer desires to make payments in accordance with Section 6.3.2 of the Restated Agreement. In any such event, the Related Organization shall give the NEBF at least thirty (30) days written notification of the cessation of contributions and the Related Organization shall give written notification to all employees and former employees (who had previously been contributed upon) that contributions have ceased. The NEBF shall be furnished with a copy of each such notification.

This Participation Agreement may be terminated by the NEBF if the Related Organization fails substantially to comply with the terms of this Participation Agreement or the terms of the Restated Agreement.

Related Organization _____
Name of Organization

Date: _____ By: _____
Name and Title

Signature

National Electrical Benefit Fund

Date: _____ By: _____
Michael J. Reed
Assistant Administrator and Controller



REPORTING PROCEDURES for Non-Bargaining Unit Employees of **Covered Employers**

1. In order to contribute on behalf of non-bargaining unit employees, Related Organizations must enter into an *NEBF Participation Agreement*. NEBF must approve and co-sign the agreement.
2. All applicable employees, including each and every temporary and part-time employee, must be reported in accordance with the option selected on the *NEBF Participation Agreement*.
3. The employer must use the applicable classification codes in accordance with the type of Agreement signed when reporting non-bargaining unit employees. The class codes are as follows:

| Code | Classification |
|------|-----------------------------------|
| 27 | Alumni Employees |
| 26 | All Non-Bargaining Unit Employees |

4. Actual hours for the reporting period must be reported for each non-bargaining unit employee, including holiday, sick, and vacation hours.
5. Actual or capped gross earnings for the reporting period must be reported for each non-bargaining unit employee, including holiday, sick and vacation pay.

When an individual earns more than a full time journeyman in any reporting period, the gross earnings on which the NEBF contribution is made for that reporting period will be 'capped'. The monthly Reportable Earnings Cap is calculated by using the journeyman's wage rate (JWR), as outlined in the appropriate collective bargaining agreement (CBA), multiplied by the hours specified in the CBA. Please note that each time the JWR changes, the Reportable Earnings Cap will also change.

An example of how to determine the Reportable Earnings Cap is as follows:

JWR = \$25.00 CBA Hours = 40 per week

The monthly Reportable Earnings Cap is \$4,333.00.

(\$25.00 x 40 hours x 52 weeks ÷ 12 months)

OR

JWR = \$25.00 CBA Hours = 35 per week

The monthly Reportable Earnings Cap is \$3,792.00.

(\$25.00 x 35 hours x 52 weeks ÷ 12 months)

Reporting Examples

1. A part time employee has 39 hours and earns \$2,000.00 for the reporting period. The Reportable Earnings Cap is \$4,333.00. (JWR of \$25.00 and weekly hours of 40 per the CBA)

Report to NEBF: 39 hours (actual hours) and \$2,000.00 (actual gross earnings)

2. An employee has 210 hours and earns \$3,150.00 for the reporting period. The Reportable Earnings Cap is \$4,333.00. (JWR of \$25.00 and weekly hours of 40 per the CBA)

Report to NEBF: 210 hours (actual hours) and \$3,150.00 (actual gross earnings)

3. A salaried employee has 160 hours and earns \$7,000.00 for the reporting period. The Reportable Earnings Cap is \$4,333.00. (JWR of \$25.00 and weekly hours of 40 per the CBA)

Report to NEBF: 160 hours (actual hours) and \$4,333.00 in earnings (the cap)

NEBF does not accept responsibility for any determinations or interpretations made by anyone other than its headquarters staff. Should a covered employer have questions regarding the proper reporting procedures, please contact NEBF at the address below:

National Electrical Benefit Fund
2400 Research Boulevard, Suite 500
Rockville, MD 20850-3266

Special Services Representatives are available between the hours of 8:30 a.m. and 5:00 p.m. (EST), Monday through Friday by calling 301-556-4300.



www.nebf.com

