

Automotive Industries Pension Plan

Checklist Item #15

Does the application include a description of the efforts that are being taken to contact participants, beneficiaries in pay status, and alternate payees?

See section 4.05(2).

Yes. The required description is attached as Document No. 15.1.

Document No. 15.1

In the beginning of 2016, the Pension Plan had a total of 25,556 participants, retirees, beneficiaries and alternate payees (“individuals”). The Pension Plan cross referenced the addresses of these individuals with records from the Automotive Industries Health and Welfare Fund and the CMTA-IAM Joint Retiree Health and Welfare Fund which are related Plans. The Pension Plan had current addresses for 22,344 individuals.

In March 2016, the Pension Plan sent records for 3,212 individuals for which it did not have addresses to Pension Benefit Information (“PBI”) for an address search. PBI searched various data bases and sent a letter to the last known address for these individuals. If an individual returned the letter the address is considered confirm. Through this method PBI was able to confirm the addresses of 1,958 individuals. After the PBI search, the Pension Plan had current addresses for 24,302 individuals, which represents 95% of the Pension Plan’s total population. PBI’s due diligence report is attached.

In June 2016 the Pension Plan had a total of 25,554 individuals (two individuals died since the beginning of 2016). The Pension Plan sent a notice to all individuals notifying them that the Pension Plan is considering and evaluating filing an application for benefit reductions under MPRA. For this mailing the Pension Plan utilized Road Runner mailing service. Road Runner used the US Post Office’s National Change of Address system which includes forwarding and address correction services. The notice was sent to 25,554 individuals of which 265 were returned undeliverable. Therefore, the Pension Plan sent notices to 25,289 individuals which represents 99% of the Pension Plan’s total population. Additionally, the Pension Plan sent the list of 265 individuals to the employee organizations representing participants under the Pension Plan to obtain current addresses.

The Pension Plan’s records have been updated with respect to both the searches conducted by PBI and the US Post Office’s National Change of Address system. To the extent that the notice of this application is returned undeliverable, the Pension Plan intends to send the list of individuals with undeliverable addresses to the local unions, to the IAM National Pension Fund, to a credit agency and to PBI.



Pension Benefit Information

Participant Research Services

P.O Box 10308
San Rafael, CA 94912

September 20, 2016

Ms. Cheryl Gibbs Bellisario
Pension Department
ATPA - Automotive Industries
1640 South Loop Road
Alameda, CA 94502

Account # 65579

Ms. Cheryl Gibbs Bellisario :

This letter is to notify you that Pension Benefit Information has exhausted all resources in trying to locate the participant(s) identified on the attached report.

PBI accesses multiple data sources in our efforts to locate missing participants or their beneficiaries. We have obtained addresses from credit sources and performed multiple mailings requesting the lost participant confirm their address with PBI. Unfortunately, PBI has not received a response from the lost participant/beneficiary to confirm their address.

If you have any participants listed in an exception report as deceased; PBI has attempted to locate a beneficiary and never received a response. If you have any invalid SSNs, please review your records and contact PBI if you have a different SSN on file. PBI can perform additional research to identify a correct SSN if you have an old address and/or DOB to assist us in our research efforts.

This close-out letter is being issued to document that a diligent search has been performed, which regrettably was unsuccessful for the participant(s) identified on the attached report. While the search was unsuccessful, rest assured that PBI has in fact conducted a comprehensive search and can provide you with detailed "proof" of our efforts if needed.

Please let me know if you need any additional information. We appreciate the opportunity to serve your address location needs.

Sincerely,

Redacted by the U.S. Department of the Treasury

Susan S McDonald
President

Close Out Package