



Getting Started

1. Mail, fax or email (preferably in an Excel spreadsheet) a census of the employees to be covered that lists each employee's **date of birth and date of hire** to the Trust office in Pittsburgh. The Trust will notify the Staff Representative whether or not the group qualified for participation and at what Benefit Accrual Rate.
2. Contact us to let us know your timetable and what analysis or other assistance will be needed.
3. If a merger is anticipated the Trust will need a copy of:
 - **The 3 most recent 5500 forms with all schedules and attachments**
 - **The most recent Actuarial Valuation Report**
 - **A copy of the Plan Document and Summary Plan Description**
 - **A copy of the current Collective Bargaining Agreement**
 - **The current market value of assets of the plan**

Dennis Powell
Field Service Representative
Steelworkers Pension Trust
60 Blvd. of the Allies, Suite 600
Pittsburgh, PA 15222
(412) 562-1170 (office)
(412) 999-8811 (cell)
(412) 562-2286 (fax)
dpowell@usw.org