

Retirement Process

- See the Union Benefits Representative. He will provide you with a UAW Pension Benefit Application and a sample UAW Retirement Package.
- Complete and return the UAW Pension Benefit Application along with your marriage certificate, your birth certificate, your spouse's birth certificate and any dependents birth certificate, or your active passport, your spouse's active passport and any dependents active passport to the Union Benefits Representative.
- The Union Benefits Representative will fax your UAW Pension Benefit Application to the DTNA Pension Department at corporate and provide you with UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical forms to complete. Start reviewing your sample UAW Retirement Package because once your Application is received, DTNA will mail an actual UAW Retirement Package to your home and you will receive it in (3) or (4) weeks.
- If you are an active UAW member you have the option of receiving a UAW retirement watch or you can donate \$100.00 to your favorite charity. Please let the Union Benefits Representative know your choice. If you choose the charity please provide him with the name, address and contact phone number of the charity. If you elected the watch about 1 to 2 weeks before your last day worked or

retirement date you should be able to pick up your watch from the Union Benefits Representative. If you chose the charity the Local UAW FST will have sent the \$100.00 to the charity about 1 to 2 weeks before your last day worked or retirement date.

- See an HR representative to order a Company retirement jacket.**
- If an employee wants to use any vacation time, sick time or PTO time before their last day worked or retirement date this must be scheduled through the normal leave scheduling process.**
- Once received complete and return your UAW Retirement Package along with the UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical forms you have completed to the Union Benefits Representative. The Union Benefits Representative will email your Retirement Package to the DTNA Pension Department and email your medical forms to Benesys the administrator of the UAW Retirees of Daimler Trucks North America Welfare Benefit Trust.**
- Please note that Benesys will mail a UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical insurance package to your home within two weeks of your UAW Retirement Package being emailed to corporate. If you completed the UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical forms and returned them to the Union Benefits Representative do not complete**

any of medical forms received in the Benesys medical insurance package, however you should review the other documents in this packet they contain important information concerning your retiree medical insurance.

- **If you have not completed the UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical forms and returned them to the Union Benefits Representative, please complete the medical forms received in the Benesys medical insurance package and return them to the Union Benefits Representative and review the other documents in this packet they contain important information concerning your retiree medical insurance. Please note if the retiree and their spouse are under age 65 there are (6) forms to complete, if the employee or their spouse are age 65 or older they will complete the (6) forms and then each one that is 65 or older will complete the (3) page Medicare form.**
- **An active employee that is already 65 or older that is retiring or any covered dependent that is already 65 or older of an active employee that is retiring must be signed up for Medicare Part “A” and “B” the first day of the month following the active employees retirement date. For example: Employee retires June 15th, the employee or their covered dependents Medicare Part “A” and “B” must begin July 1st. The employee or the employees covered dependent should begin the process for signing up through their Social Security office around 60 to 90 days before their retirement date. A copy of their Medicare card must be**

provided to Collen Johnson the Benesys representative before the employees retirement date. Contact the UAW Benefits Representative with any questions.

- If an active employee or any dependent of an active employee has Medicare Part “A” and “B” prior to the employee’s retirement, they must continue Medicare Part “A” and “B” to be eligible for retiree healthcare. A copy of their Medicare card must be provided to Collen Johnson the Benesys representative before the employees retirement date. Contact the UAW Benefits Representative with any questions.
- To remain on the UAW retiree healthcare plan a retiree or any retiree covered dependent must be signed up for Medicare Part “A” and “B” starting with the month of their 65th birthday. For example; the retiree’s 65th Birthday is July 29th, they must be signed up for Medicare Part “A” & “B” by July 1st. The retiree or dependent should start the process to sign up through their Social Security office around 60 to 90 days before their birthday. A copy of their Medicare card must be provided to Collen Johnson the Benesys representative before the retiree turns age 65. Contact Collen Johnson at Benesys or the UAW Benefits Representative with any questions.
- If a retiree or any dependent of a retiree under age 65 becomes eligible for Medicare Part “A” and “B” they must pick up both Medicare Part “A” and “B”. They also must notify Collen Johnson at Benesys immediately and they

must provide her with a copy of their Medicare “A” and “B” card immediately. Contact Collen Johnson at Benesys or the UAW Benefits Representative with any questions.

- **Retired employees and any dependents of retired employees that have Medicare “A” and “B” will be in the Retiree BCBSM Medicare advantage Plan and should not use their government issued Medicare “A” and “B” card and should only use their BCBSM Medicare advantage card for any medical services received. Keep your government issued Medicare “A” and “B” card but Do Not Use.**
- **A retiree’s DTNA medical insurance will end on the last day of the month that the retiree retires and their UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical insurance begins the first day of the month following their retirement date. For example: Retiree retires June 15th, their DTNA medical insurance ends June 30th and their UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical insurance begins July 1st. Also the retiree should receive their UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical cards near the end of the month they retire in or at the first of the month after the month they retire. Retirees under age 65 and each dependent under age 65 will receive a BCBSM medical card used for medical and vision claims, a Express Scripts card used for prescription claims and a Moda Dental card used for Dental claims (Retiree and spouse keep retiree dental insurance until the retired employee turns age 65,**

once the retired employee turns 65 both parties loose coverage).

A Retiree 65 or older or a retiree's spouse that is 65 should also receive their UAW Retirees of Daimler Trucks North America Welfare Benefit Trust medical cards near the end of the month they retire in or at the first of the month after the month they retire. Retirees age or older 65 and each dependent age 65 or older will receive a Medicare Advantage BCBSM card used for medical claims (put your Medicare card up, DO NOT USE IT) an Express Scripts card used for prescription services and BCBSM vision card used for vision services. Once retired you and your spouse lose dental coverage.

- Your retiree insurance prescription drug plan requires that Express Scripts mail order be used for maintenance medications (90 day supplies) if you or any covered dependent are under age 65 and not on Medicare.**

However, once you or any covered dependent turn 65 (Must sign Up for Medicare "A" & "B") and Medicare becomes primary or once you or any covered dependent under age 65 become Medicare eligible (Must sign Up for Medicare "A" & "B") and Medicare becomes primary you do not have to use Express Scripts mail order for maintenance medications (90 day supplies), you can use your local pharmacy for obtaining maintenance medications (30 day supplies).

- **On your last work day clock in at your regular scheduled work time and give your badge and your parking sticker to an HR representative. Stop by and see local payroll. Once you have given your badge and your parking sticker to an HR representative you can walk around and say your goodbyes to fellow co-workers or leave any time but make sure you do not clock out, local payroll will clock you out at your regular scheduled leave time. Any unused vacation, sick, PTO and accrued vacation will be paid out with your last check. It will be direct deposited.**
- **Once retired you will receive your pension check the first of the month following the month you retired in, regardless of what day you retired in that month.**
- **A couple of weeks after your retirement date you will be mailed a Cobra medical insurance package to your home, you can disregard this package and throw it away as long as you have medical insurance coverage through the retiree UAW Retirees of Daimler Trucks North America Welfare Benefit Trust or elected to continue retiree medical insurance coverage through the retiree UAW Retirees of Daimler Trucks North America Welfare Benefit Trust.**
- **Retirees have UAW membership meeting every quarter, dues are \$3.00 per month but these dues are paid voluntarily and are not mandatory. You will be notified by mail and by phone messaging 1 to 2 weeks before the scheduled date of the meeting.**

- **Also, a retired employee with ten years' service with a retirement date between 01/29/2003 and 08/25/2006 has a \$5000.00 life insurance death benefit. Retiree's with a retirement date between 08/26/2006 and 04/26/2024 have a \$10,000.00 death benefit provided to them by the company and negotiated for them by the Union. When they completed their retirement paperwork they completed a beneficiary form for this \$10,000 life insurance policy. When a retired employee passes away, their beneficiary or beneficiaries should call the UAW Benefits office. The Benefits Representative will provide information to them on how to receive a payout for this \$10,000 life insurance policy.**
- **Once retired if you have any questions concerning your pension and you registered for the BYNM (Bank of New York Mellon) website, please review that site for answers to your questions or contact the BYNM toll free at 800-634-7936. However if needed you can contact the DTNA Corporate Retirement Hot Line at 503-745-7833.**
- **Finally if you have issues with your medical claims, prescription drug claims, vision claims or dental claims please contact the specific insurance carriers customer service department for help in resolving your issue, the insurance carriers customer service numbers can be found on the back of your insurance cards or located on the Contact Information sheet the Union Benefits Representative provided you or on Local 5286's Website. If**

they cannot resolve your issue you can contact Benesys's Eligibility and Administration general contact number toll free for help in resolving your issue at 844-582-4443 or you can call Colleen Johnston the Benesys Eligibility Coordinator for the UAW Retirees of Daimler Trucks North America Welfare Benefit Trust at 248-813-9800 extension 3271. If you have contacted the specific insurance carriers customer service department and Benesys and your issue is still not resolved or you still have questions or feel your claims were still not processed correctly please contact your Union Benefits Representative at 704-868-5646.