



# Annual Account Balance Statement For the SEIU 775 SECURE RETIREMENT PLAN

www.myseiubenefits.org/retirement

**Statement Period: Plan Year 03/01/2017-02/28/2018**  
See reverse side for additional information

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The SEIU 775 Secure Retirement Plan is the first of its kind in the nation for homecare workers! The goal of the Secure Retirement Plan is to provide additional financial security when you retire. In July 2018, the contribution rate increased from \$0.25 to \$0.50 per qualifying hour<sup>1</sup>. This increase will be reflected on your next annual statement.

This statement reflects your account balance as of the end of the second year of the retirement plan.

<b>Total Hours reported</b> for plan year one 3/1/16-2/28/17	xxx.xx
<b>Total Hours reported</b> for plan year two 3/1/17-2/28/18	xxx.xx
<b>Status:</b> Not yet vested	
<b>Prior year-end account balance</b> as of 2/28/2017	\$ xxx.xx
<b>Plus employer contributions</b>	\$ xxx.xx
<b>Plus gains</b>	\$ xx.xx
<b>Less expenses</b>	\$ - xx.xx
<b>New year-end balance as of 2/28/2018</b>	\$ xxx.xx

- Total hours reported** – Caregiving hours reported for the first two years of the plan. You must report 300 hours per plan year for three years without a permanent break in service<sup>2</sup> to vest in the plan.
- Status** – You vest in the plan after working a minimum of 300 hours each year for three years<sup>3</sup>. To withdraw a benefit, you must be vested and meet the normal retirement age of 65.
- Prior year-end account balance** – This is your account balance as of the end of the last plan year.
- Employer contributions** – This reflects contributions made under the Collective Bargaining Agreement that apply to you<sup>1</sup>. All plan contributions are solely funded by your employer.
- Gains** – This reflects an increase in your account value due to the investment gains and interest income earned in the plan. Investments in the plan are directed by the Secure Retirement Trustees.
- Expenses** – This reflects a decrease in your account value due to the operating expenses of the plan. These expenses are related to the administration of participant accounts.
- Year-end balance** – This is your account balance as of February 28, 2018.

If you have a question regarding the contents of your statement or the plan itself, please contact our Retirement Specialists at 1-866-770-1917 and select option 3 between 8 a.m. and 5 p.m. Pacific Time, Monday-Friday. Information is also available at [www.myseiubenefits.org/retirement](http://www.myseiubenefits.org/retirement).

<sup>1</sup> Please refer to [www.seiu775.org](http://www.seiu775.org) to see a copy of your Collective Bargaining Agreement to determine which hours qualify for contributions. PTO and Training hours are typically included in total hours reported but not in contribution hours.

<sup>2</sup> A permanent break in service occurs after five, consecutive years reporting less than 300 hours.

<sup>3</sup> The third plan year ends on February 28, 2019.



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## DETAILS FOR THE STATEMENT PERIOD

Work Date	Contributing Employer	Qualifying Hours <sup>1</sup>	Total Hours <sup>1</sup>
Mar 17	SRT Employer		
Apr 17	SRT Employer		
May 17	SRT Employer		
Jun 17	SRT Employer		
Jul 17	SRT Employer		
Aug 17	SRT Employer		
Sept 17	SRT Employer		
Oct 17	SRT Employer		
Nov 17	SRT Employer		
Dec 17	SRT Employer		
Jan 18	SRT Employer		
Feb 18	SRT Employer		
	TOTAL		

The data in this statement is based on employer reports and is subject to changes based upon subsequent contribution information, terms of the Plan, Qualified Domestic Relations Orders and evidence submitted with your application of benefits. This statement is unaudited. Audit adjustments for this period will be reflected in a following statement.

### WHERE CAN I GO FOR HELP?

Website: [www.myseiubenefits.org/retirement](http://www.myseiubenefits.org/retirement)  
 Phone: **1-866-770-1917 and select option 3**  
 Mailing: Secure Retirement Plan Administrative Office  
 C/O ZENITH-AMERICAN SOLUTIONS  
 11724 NE 195th Street, Suite 300  
 Bothell, WA 98011-8242

Contact us for address changes to ensure you continue to receive your statements.

Чтобы прочитать это письмо на русском языке, перейдите по ссылке

[www.myseiubenefits.org/retirement/statement/russian](http://www.myseiubenefits.org/retirement/statement/russian)

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Para leer una copia de esta carta en español, ingrese en [www.myseiubenefits.org/spanish](http://www.myseiubenefits.org/spanish)

Để đọc bức thư này bằng tiếng Việt, hãy truy cập [www.myseiubenefits.org/retirement/vietnamese](http://www.myseiubenefits.org/retirement/vietnamese)

한국어 본 편지를 한국어로 읽으시려면, [www.myseiubenefits.org/retirement/korean](http://www.myseiubenefits.org/retirement/korean)로 가십시오