


I.B.E.W. DISTRICT NO. 9 PENSION PLAN

Administered by Joseph H. Herrle & Associates, Inc.

CHANGE IN PLAN ADMINISTRATOR EFFECTIVE JANUARY 1, 2025

To: All Plan Employers, Local Unions and Plan Professionals
From: Administrative Office of the I.B.E.W District. No. 9 Pension Plan
Date: November 2024
Subject: Effective January 1, 2025, the Plan will be administered by the William C. Earhart Company

What's happening?	Starting January 1, 2025 , the William C. Earhart Company ("Earhart") will take over administrative services for the I.B.E.W District. No. 9 Pension Plan ("the Plan"). The current administrator, Joseph H. Herrle & Associates , will continue those services through December 31, 2024 .
Why make a change?	The Board of Trustees approved Earhart to provide the best combination of administrative services, participant relations, and pricing that will benefit participants, beneficiaries, and participating employers. Earhart will partner with the Plan's recordkeeper, Principal , to deliver Plan services beginning January 1, 2025 .
Filing hours and contribution reports before January 1, 2025	<u>Through December 31, 2024</u> , you should follow the same procedures you are currently using to report hours and file contributions reports.
Filing hours and contribution reports beginning January 1, 2025	If you are filing paper reports , the reports should be sent to Earhart at: PO Box 4148 Portland, OR 97208 You may contact Earhart at 503.460.5276 or 877.396.5876 for more information. Earhart's Fax: 503.284.9386
	If you are filing electronically , Earhart will be reaching out to you to set up your online account. Once your account is set up you will go to https://wcearthart.com/ and click on the button to submit your contribution reports and payments. Additional details will be forthcoming in a subsequent mailing.
How this will affect your employees who participate in the Plan	Your participants have received a notice of the change in administrator. A copy of this notice is attached for your reference.

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<p>Plan webpage</p>	<p>Starting January 1, 2025, the Plan's webpage address will be: www.wcearthart.com. You can also continue to view information about your account in the Plan on www.principal.com.</p>
<p>Message from Joseph H. Herrle & Associates, your current Plan administrator</p>	<p>Joseph H. Herrle & Associates has been associated with the I.B.E.W. District. No. 9 Pension Plan since the Plan's inception in 1968 and places great value on this long association with the Plan, its participants, trustees, and Plan Professionals.</p> <p>The staff of Joseph H. Herrle & Associates is committed to making the transition to the William C. Earhart Company go as smoothly as possible and will support the Plan and its participants fully during this process.</p>