

The following chart provides basic details on the union Pension and Health & Welfare Plans that employers may need for FASB financial disclosure and reporting requirements. Copies of Summary Reports, Annual Funding Notices and similar are available at most of the listed websites; contact UCON if you are unable to locate them. The Plan Year of the Pension Plan is colored green, yellow or red depending on the last Plan Year's certified zone status: **green** = funded; **yellow** = endangered; **red** = critical. Contact UCON Labor & Member Services if you cannot find the latest Pension status report on the Trust Fund website.

Copies of each Plan's IRS Form 5500 are available from the Department of Labor's Employee Benefits Security Administration Form 5500 Search [web page](#).

- EIN - Enter the Tax ID Number (Federal Employment Identification Number)
- PN - Enter the Plan number

| PLAN NAME  |   | PLAN NO. | PLAN YEAR  | FEIN/TAX ID# | WEBSITE(S) FOR ADDITIONAL DOCUMENTS &/OR CONTACT INFORMATION  |
|--|---|----------|------------|--------------|---|
| <b>PENSION PLANS</b>   |   |          |            |              |   |
| <b>Carpenters/Pile Drivers (Northern California)</b>             | Carpenters Pension Trust Fund for Northern California       | 001      | 9/1-8/31   | 94-6050970   | <a href="https://cfao.org/employer/financial-accounting-standards-board-disclosures-fasb/">https://cfao.org/employer/financial-accounting-standards-board-disclosures-fasb/</a>   |
| <b>Carpenters/Pile Drivers (Southern California)</b>             | Southwest Carpenters Pension Plan                           | 001      | 1/1-12/31  | 95-6042875   | <a href="https://employers.carpenterssw.org/">https://employers.carpenterssw.org/</a><br>(scroll down to Important Resources and Documents for Employers)   |
| <b>Cement Masons (Northern California)</b>                       | Cement Masons Pension Trust Fund for Northern California    | 001      | 9/1-8/31   | 94-6277669   | <a href="https://www.norcalcementmasons.org/Home/">https://www.norcalcementmasons.org/Home/</a><br>Contact HSBA at (707) 864-3300 if information not posted.  |
| <b>Cement Masons (Southern California)</b>                       | Cement Masons Southern California Pension Trust             | 001      | 1/1-12/31  | 95-3379185   | No website – contact Zenith American Solutions at (626) 444-4600  |
| <b>Iron Workers</b>  | California Ironworkers Field Pension Trust                  | 001      | 6/1-5/31   | 95-6042866   | <a href="https://www.ironworkerbenny.com/wufoo-form-multiple/plan-document-and-annual-funding-notices/40093/1">https://www.ironworkerbenny.com/wufoo-form-multiple/plan-document-and-annual-funding-notices/40093/1</a> |
| <b>Laborers (Northern California)</b>                            | Laborers Pension Trust Fund for Northern California         | 001      | 6/1-5/31   | 94-6277608   | <a href="https://norcalaborers.org/forms-and-publications/">https://norcalaborers.org/forms-and-publications/</a><br>(Under Employers, click on Compliance & General Information)                                       |
| <b>Laborers (Southern California)</b>                            | Construction Laborers Pension Trust for Southern California | 001      | 1/1-12/31  | 43-6159056   | No website – contact Pacific Southwest Administrators at (626) 279-3000   |
| <b>Laborers (San Diego County)</b>                               | San Diego County Construction Laborers' Pension Trust       | 001      | 9/1 – 8/31 | 95-6090541   | No website – contact Pacific Southwest Administrators at (626) 279-3000   |
| <b>Operating Engineers Local No. 3</b>                           | Pension Trust Fund for Operating Engineers                  | 001      | 1/1-12/31  | 94-6090764   | <a href="http://www.oe3trustfunds.org/Home/">www.oe3trustfunds.org/Home/</a>  |
| <b>Operating Engineers Local No. 12</b>                          | Operating Engineers Pension Trust                           | 001      | 7/1-6/30   | 95-6032478   | <a href="https://www.oefi.org/pension-plan/forms-and-documents/">https://www.oefi.org/pension-plan/forms-and-documents/</a>   |
| <b>Teamsters (Northern California &amp; Southern California)</b> | Western Conference of Teamsters Pension Plan                | 001      | 1/1-12/31  | 91-6145047   | <a href="http://www.wctpension.org/fyi/fyi.html">www.wctpension.org/fyi/fyi.html</a>  |

**NOTE: Disclosure of unfunded liability estimates should not be needed unless the employer's withdrawal from the plan is probable.**

| PLAN NAME  |   | PLAN NO. | PLAN YEAR | FEIN/TAX ID# | WEBSITE(S) FOR ADDITIONAL DOCUMENTS &/OR CONTACT INFORMATION   |
|--|---|----------|-----------|--------------|--|
| <b>HEALTH &amp; WELFARE PLANS</b>                    |   |          |           |              |  |
| <b>Carpenters/Pile Drivers (Northern California)</b> | Carpenters Health and Welfare Trust Fund for California             | 501      | 9/1-8/31  | 94-1234856   | <a href="https://cfao.org/benefits/">https://cfao.org/benefits/</a>  |
| <b>Carpenters/Pile Drivers (Southern California)</b> | Southwest Carpenters Health and Welfare Trust                       | 501      | 1/1-12-31 | 95-6042873   | <a href="https://carpenterssw.org/en/forms-docs/">https://carpenterssw.org/en/forms-docs/</a><br>(see Summary Annual Reports under Health) |
| <b>Cement Masons (Northern California)</b>           | Cement Masons Health and Welfare Trust Fund for Northern California | 501      | 9/1-8/31  | 94-1291152   | <a href="http://www.norcalcementmasons.org/home/">www.norcalcementmasons.org/home/</a>   |
| <b>Cement Masons (Southern California)</b>           | Cement Masons Southern California Health and Welfare Fund           | 501      | 1/1-12/31 | 95-6042883   | No website – contact Zenith American Solutions at (626) 444-4600   |
| <b>Iron Workers</b>                                  | California Ironworkers Field Welfare Plan                           | 501      | 6/1-5/31  | 95-6042868   | <a href="http://www.ironworkerbenny.com/benefits/benefitsummaries.html">www.ironworkerbenny.com/benefits/benefitsummaries.html</a>         |
| <b>Laborers (Northern California)</b>                | Laborers Health and Welfare Trust Fund for Northern California      | 501      | 6/1-5/31  | 94-1235152   | <a href="https://norcalaborers.org/forms-and-publications/">https://norcalaborers.org/forms-and-publications/</a>                          |
| <b>Laborers (Southern California)</b>                | Laborers Health and Welfare Trust Fund for Southern California      | 501      | 1/1-12/31 | 51-6146048   | No website – contact Pacific Southwest Administrators at (626) 279-3000  |
| <b>Operating Engineers Local No. 3</b>               | Operating Engineers Health and Welfare Trust Fund                   | 501      | 1/1-12/31 | 94-2784001   | <a href="http://www.oe3trustfunds.org/Home/">www.oe3trustfunds.org/Home/</a>   |
| <b>Operating Engineers Local No. 12</b>              | Operating Engineers Health and Welfare Fund                         | 003      | 7/1-6/30  | 95-6034886   | <a href="http://www.oefi.org/">http://www.oefi.org/</a>  |
| <b>Teamsters (Northern California)</b>               | Teamsters Benefit Trust   | 501      | 10/1-9/30 | 94-2848389   | <a href="http://www.tbtfund.org/">www.tbtfund.org/</a><br>(Construction Teamsters are Plan V-A)  |
| <b>Teamsters (Southern California)</b>               | Construction Teamsters Security Fund for Southern CA                | 501      | 4/1-3/31  | 95-6059190   | No website – contact Zenith American Solutions at (626) 732-2150   |