


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 Participants, Pensioners, Beneficiaries, and Alternate Payees
From: Board of Trustees 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 .
How this change will affect your Plan account 	Beginning January 1, 2025 , if you have questions about the Plan or want to apply for a distribution from the Plan you will contact Earhart at 503.460. 5276 or 877.396.5876 or www.wcearthart.com . Use the QR code to access information about your Plan on the Earhart website. Principal will continue to be the Plan's recordkeeper. If you have questions about your existing Plan account, please contact Principal . You can access your Account at www.principal.com or you can call a representative at 800.547.7754. Participants can: <ul style="list-style-type: none">• Transfer funds.• Change your investment elections.• View your contribution history.• View quarterly statements.• Determine your retirement income needs and ways to achieve your goals through Principal's online retirement planning feature. Principal's login process is designed to protect your account. If you are not registered, visit www.principal.com and select Log In. Follow the prompts for "New User? Register here" and "Individual." Your ID Number is your Social Security number; Principal's ID Number for the entire Plan is (3)54801.
No action required by you at this time.	All of your information will be automatically transferred to Earhart . If you are currently receiving scheduled distributions from your Plan account, those will continue to be issued by Principal .

Joseph H. Herrle & Associates is the Plan administrator until December 31, 2024 .	<p>Until December 31, 2024, you should contact Joseph H. Herrle & Associates at 800.804.2385 if you have a question about the Plan, if you would like to apply for a distribution, or if you have any other Plan administration questions. You can continue to use the contact information provided at the bottom of this page through the end of December 2024.</p> <p>As noted above, Principal is the Plan's recordkeeper, and a wealth of information about the Plan is available at www.principal.com.</p>
Beginning January 1, 2025 , contact Earhart .	<p>You can contact Earhart for all plan administration issues and services starting January 1, 2025, as follows:</p> <p>Mailing address: PO Box 4148 Portland, OR 97208</p> <p>Phone: 503.460.5276 or 877.396.5876</p> <p>Fax: 503.284.9386</p>
Plan webpage	<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>
Message from Joseph H. Herrle & Associates, your current Plan administrator	<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>