

OPERATING ENGINEERS TRUST FUNDS

I.U.O.E. LOCAL 12 HEALTH & WELFARE / PENSION / VACATION / DCP

100 CORSON STREET, SUITE 100 • PASADENA, CALIFORNIA 91103 • (866) 400-5200
P.O. BOX 7063, PASADENA, CALIFORNIA 91109
TTY: (626) 356-3582 WEBSITE: www.oefi.org



TO: ACCOUNT HOLDERS
OPERATING ENGINEERS LOCAL 12 DEFINED CONTRIBUTION PLAN

FROM: BOARD OF TRUSTEES
OPERATING ENGINEERS LOCAL 12 DEFINED CONTRIBUTION PLAN

DATE: JUNE 4, 2021

SUBJECT: CHANGE IN ACCOUNT ADMINISTRATORS AND RELATED BLACKOUT PERIOD

This notice is to inform you that the Operating Engineers Local 12 Defined Contribution Trust will be changing individual account record keepers from the existing record keeper, Mass Mutual, to John Hancock Retirement Services, LLC effective August 2, 2021.

As a result of this change, Participants, Alternate Payees and Beneficiaries will be unable to receive distributions from individual accounts from July 9, 2021 through August 15, 2021. There will also be a disruption in the ability to review their individual account balances on the websites of the current and future record keeper. If you are planning retirement in the near future, we encourage you to carefully consider how this blackout period may affect your retirement planning as well as your overall financial plan.

The blackout period for the Plan is expected to begin on July 9, 2021 and end on August 15, 2021.

If you have any questions concerning this notice, you should contact the Fund Office's Member Service Department at (866) 400-5200 (M-F 8:30am – 4:30pm) or via email to the Fund Office at customerservice@oefi.org.



Great news! The Board of Trustees have partnered with John Hancock to provide you with a retirement savings plan.

We're busy preparing for your arrival, but in the meantime, there are a few things you'll need to know.

Need to talk?

Call us anytime during the process at 1-833-38-UNION.

Mobile App



For Android



For IOS



Here is what you need to know.

Your account will be moving from your prior provider starting July 9, 2021 and will be set up with us by August 15, 2021. While it is on the move, you will not have access to your account.

When the plan goes live

Anytime after August 15, 2021 visit myplan.johnhancock.com and click "Register Now" to get started. Be sure to pick a strong password, keep your password safe and change it regularly. Make sure you provide an email address and/or mobile phone number to help keep your account secure. Confirming transactions by email can help safeguard your account against fraudulent activity.

Want to access your account on the go?

When the transition is complete you will also have access to your account through John Hancock mobile retirement application. The retirement app helps make it easy to manage your retirement plan. Connect to your plan and its financial tools with a touch or a smile, anytime, anywhere.

To download the retirement app scan the QR code for your smartphone in the left hand column.