

LOCAL 639 LEGAL SERVICES TRUST FUND

Teamsters Local 639 Center
P.O. Box 99489
Troy, MI 48089-9998



(202) 636-8181 – Phone
(800) 983-2699 – Toll Free
(202) 526-7959 – Fax

March 14, 2023

SUMMARY OF MATERIAL MODIFICATION #2

Dear Participant:

The Board of Trustees of the Local 639 Legal Services Trust Fund (“Fund”) is pleased to announce a benefit improvement. For services rendered on and after March 7, 2023, the hourly rate for Participating Attorneys who have contracted with the Fund to provide legal service benefits to eligible participants under the terms of the Plan has been **increased to \$140 per hour**. The Fund’s Roster of Participating Attorneys was updated effective January 1, 2023. All of the attorneys on the Roster are available for consultation.

This is a reminder that, under the terms of the Plan, you are not required to consult with or be represented by a Participating Attorney. You may contact any attorney of your choosing. If you engage a non-Participating Attorney, however, you must make your own fee agreements. Claims for the services of non-participating attorneys can be paid by the Plan, but they are subject to the same maximum hourly rate of \$140, the Plan’s hours limitations, and other regulations and limitations that are specified in the Plan’s Summary Plan Description (“SPD”).

Please consult the Plan’s SPD for a full understanding of your benefits and obligations under the Plan. If you have any questions, please contact the Fund Office at (202) 636-8181 or toll free at (800) 983-2699. Please note you may also access these documents on the Fund’s Participant website:

www.ourbenefitoffice.com/teamsterslocal639trustfunds/benefits

Member Service representatives are available at the Fund Office to assist you with your Legal Fund questions and claims. You may visit or call the Fund Office Monday through Friday from 9:00 a.m. until 5:00 p.m. The Fund Office is located at:

3130 Ames Place, NE
Washington, DC 20018
Phone: (202) 636-8181
Fax: (202) 526-7959
Toll Free: (800) 983-2699

Sincerely,

Board of Trustees

LOCAL 639 LEGAL SERVICES TRUST FUND
PO Box 99489, Troy, MI 48099
Phone (202) 636-8181

March 2023

The Board of Trustees of the Local 639 Legal Services Plan is notifying all **eligible participants** of the annual Income Tax Preparation Benefit. The Fund will pay up to \$140 of the fee charged by a Professional Tax Preparer for the preparation of your 2022 income tax return. Further, the Fund will allow electronic filing fees as part of the \$140 maximum benefit.

To take advantage of this valuable benefit you must:

1. Be eligible for services on the date your return was prepared.
2. Have a **Professional Tax Preparer** prepare your return.
3. Provide us with a **Tax Preparer's Receipt** that clearly shows:
 - a. Your full name;
 - b. The Tax Preparer's social security number or federal tax identification number; and
 - c. The Tax Preparer's fee and services provided.
4. Provide us with a **copy** of the **completed signature section only** for your Federal form 1040 tax return which shows your signature and the signature and Federal Identification number of your Professional Tax Preparer.
5. Complete the **lower portion of this letter**.
6. Return this letter and **all the information requested** to the Fund Office at **PO Box 99489, Troy, MI 48099**.

Reimbursement will only be made to you. You can help avoid the delay in getting your allowable reimbursement by making sure you have provided us with all the information requested.

Sincerely,

Scott Clark, Chairman-Trustee

Michael Goble - Trustee

Leon Kenneth Hamilton, Trustee

Frank W. Stegman, Trustee

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PO Box 99489, Troy, MI 48099
Phone (202) 636-8181

PARTICIPANT'S

NAME: _____

SOCIAL SECURITY NUMBER: _____

ADDRESS: _____
