



Providing Benefits to Oregon Homecare
and Personal Support Workers

Benefits Trust

<!\$MG_Date>

<!\$MG_Name>
<!\$MG_Addr1>
<!\$MG_Addr2>
<!\$MG_Addr3>

Dear <!\$MG_Name>:

You are receiving this letter because you may be eligible for Paid Time-Off (PTO) benefits through the Oregon Homecare Workers Benefit Trust ("Trust") if you complete the steps described in this letter. This PTO benefit is designed for you to use in connection with taking time off from your job as a live-in homecare worker.

If you are eligible for a PTO benefit and you do not apply to receive it, 50% of your total accrued benefit (<!\$MG_REMAININGHOURS>) or <!\$MG_DOLLARBANKBALANCE>, based on your hours worked, automatically will be paid to you on [date]. The remaining 50% of your total accrued benefit will rollover into the following calendar year. **Please note, you will be taxed on the full amount of the PTO benefit in the calendar year in which you earned it, even if you elect not to receive your full benefit in that year.**

In order to be eligible for PTO benefits, you must send a completed and executed original of the enclosed Form W-9 to the Trust. If you do not submit a completed Form W-9, you will not be eligible to receive a PTO benefit, even if you meet all of the other eligibility criteria under the Trust.

Enclosed are the documents to help you claim and receive your Paid Time Off benefit.

1. W-9 Form
2. Designated Beneficiary Form*
3. PTO Benefit Request Form
4. PTO Frequently Asked Questions (FAQ)
5. Return Envelope

If you are eligible to receive a PTO benefit and you do not submit a completed beneficiary designation form, or if the beneficiaries you name on that form do not survive you, any remaining PTO benefit payable to you upon your death will be paid to the administrator of your estate.

If you have any questions about the Paid Time Off benefit available under the Trust, please contact the Trust Office at 1-844-507-7554, option 3 and then option 2 or via email at OHCWTPTO@bsitpa.com

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The benefits of the Homecare Workers Supplemental and Benefits Trusts were negotiated by SEIU Local 503 homecare and personal support workers through their bargaining team.

P.O. BOX 6, MUKILTEO, WASHINGTON 98275

Trust Administration: 844-507-7554 fax: 866-459-4623 email: OHCWT@bsitpa.com

