

GENERAL INSTRUCTIONS FOR COMPLETION OF DOWNLOADABLE BLANK REMITTANCE FORM

This combined report is designed to minimize the effort of employers required to contribute to the Benefit Funds, both national and local, sponsored by the Sheet Metal Workers International Association and contributing employers. A separate report should be filled out for each Local Union with which you have an agreement and under which jurisdiction you have used sheet metal workers. For all Funds except SASMI and SASMI-II, OWNERS, PARTNERS, DIRECTORS, OFFICERS and MAJORITY STOCKHOLDERS cannot be contributed for unless application is made to and accepted by the Board of Trustees of the particular fund. For SASMI and SASMI-II, such groups and/or individuals should refer to the rules and regulations of SASMI and/or SASMI-II or contact those specific Fund Offices.

The report and remittance must be received for all funds no later than the 20th day following the end of the month in which the work occurred, or earlier if the Bargaining Agreement or specific plan requires it.

ALL EMPLOYERS MUST ENTER THEIR COMPANY NAME AND ADDRESS, PAYROLL MONTH AND YEAR, AND LOCAL UNION NUMBER. EMPLOYER ACCOUNT NUMBER SHOULD BE ADDED, IF KNOWN. ALL EMPLOYERS MUST COMPLETE COLUMNS A-I. IF YOU CONTRIBUTE TO SASMI OR SASMI-II YOU MUST ALSO COMPLETE COLUMNS J-M.

Specific Instructions

1. For each sheet metal worker employed, enter the social security number (column A), last name and first initial (column B), home local union number (column F).

If you contribute to SASMI or SASMI II, enter the job classification in column (J). The following job classification codes are to be used for column J:

A1 – Apprentice – 1 st 6 months	A8 – Apprentice - 43 to 48 months
A2 – Apprentice – 7 to 12 months	A9 – Apprentice – 49 to 54 months
A3 – Apprentice – 13 to 18 months	AA – Apprentice – 55 to 60 months
A4 – Apprentice – 19 to 24 months	J – Journeyman
A5 – Apprentice – 25 to 30 months	F – Foreman
A6 – Apprentice – 31 to 36 months	G – General Foreman
A7 – Apprentice – 37 to 42 months	O – Owner
	PA – Pre Apprentice

2. All employers should enter each employee's regular hours (column G), time-and-a-half hours (column H) and double time hours (column I).
3. SASMI and SASMI-II employers should then enter each employee's gross wages in column (K). Gross wages are those reportable on IRS Form W-2. Do not include travel pay, which is reported on IRS Form 1099. SASMI (not SASMI-II) employers should also enter in column (L) the total amount payable to fringe benefit funds for each employee for which contributions are due to SASMI (not including training and industry funds).
4. All employers should enter the number of hours for which they are required to contribute to each fund to be listed in the headings at the top of each column. Alternatively, these boxes can be used to record the dollar amount due a Fund if the contribution rate is a percentage of wages. In the National Pension Fund column the total hours should equal straight time hours, plus 1-1/2 times time-and-a-half hours, plus 2 times double time hours; report converted hours. (Ex. 130 regular, 10@ time and ½, 10 @ double = 165 converted hours).

5. Total columns G-L and enter the grand totals on the TOTALS line on the last page of the report. Total columns and enter the grand totals on line 1 at the bottom of the last page.

Calculating Amount Due

1. All employees should enter the contribution rate due each fund on line 2 at the bottom of the last page. Multiply line 1 times line 2 and enter the gross amount due on line 3. Enter any adjustments on line 4 and explain the adjustment on a separate page or attach the correspondence, which led to the adjustment. Enter the total of lines 3 or 4 on line 5.
2. One check should be prepared to represent contributions due to the NATIONAL PENSION FUND, SASMI, SASMI-II, INTERNATIONAL TRAINING INSTITUTE, NEMI, SMOHI, SHEET METAL WORKERS' INTERNATIONAL ASSOCIATION SCHOLARSHIP FUND, and SHEET METAL WORKERS' NATIONAL SUPPLEMENTAL SAVINGS PLAN, or any combination of these funds provided for in your collective bargaining agreement. This one check is to be mailed with this form to the SHEET METAL WORKERS NATIONAL BENEFIT FUNDS P.O. Box 79321, Baltimore, Maryland 21279-0321. The amount of this check should be entered in the box titled "NATIONAL BENEFIT FUNDS" near the bottom of the report.
3. Questions regarding the balance of the fringe benefit funds to which you are obligated to contribute should be directed to the Fund office.
4. Sign the form; enter your title, phone number and the date on which the report was prepared.

5. SASMI and SASMI-II Employers Only

Complete the boxes in the lower right hand corner of the last page. SASMI employers should complete items 1 through 5. SASMI-II employers should complete only items 1, 4, and 5.

Employers contributing to the Sheet Metal Workers' National Supplemental Savings Plan (401(k)) should enter the contribution rate per employee. This contribution rate is to be multiplied by the hours reported in columns G, H and I. The resulting amount should be recorded in the box in the 401(k) rate column alongside each employee's name.