



Pension Fund Notes

Newsletter of the American Federation of Musicians and
Employers' Pension Fund

AFM-EPF Sends Letters to Congressional Leaders in Support of Pension Legislation

Last month, we informed participants that federal legislation introduced by U.S. Senator Sherrod Brown (the “Butch Lewis Act”) would address the financial issues confronting the AFM-EPF, and that bipartisan negotiations are underway in Congress to produce a solution to the national multiemployer pension crisis.

The AFM-EPF has sent a letter to Congressional leaders to convey our support for the Butch Lewis Act, and to urge them to pass legislation that helps our Fund and treats our participants fairly. You can read this letter [here](#).

To learn more about the Butch Lewis Act and how to contact your Members of Congress, you can read the December 21, 2017 issue of *Pension Fund Notes* on the Fund’s [Announcements page](#).

Information Available to All Participants About the Pension Fund

We want to make sure all participants are aware of and take advantage of the wealth of information available to them about the Fund. You can visit www.afm-epf.org now to view the following under the “Stay Informed” menu or by clicking on “[Stay Informed](#)” on the homepage:

- [Frequently Asked Questions](#) about the Fund’s financial status, investments, expenses, and more.
- [An Annotated Presentation](#) that describes the current state of the Fund, how we got to this point, how the Trustees are responding, and what the future holds. The presentation explains a host of issues affecting the Fund, including investment performance, Fund expenses, the interplay of contributions and benefits, and more. The Trustees and Fund actuaries, investment advisors and legal counsel delivered versions of this presentation throughout 2017 to union membership and conference meetings

across the country.

- [The Fund's Most Recent Form 5500](#) and instructions to view Form 5500s for prior years. The "Form 5500" is a report that employee benefit plans file with the U.S. Department of Labor each year. It shows details of the Fund's operations, including the independent auditor's report, investments, assumptions and methods used by the Fund's actuaries, and overall expenses.

The Fund's most recent Form 5500 provides information for the fiscal year ending March 31, 2016. The Fund will file its March 31, 2017 Form 5500 by the government's extended deadline of January 16, and we will post it to the website soon thereafter. Filing by the extended deadline is by far the standard practice across multiemployer pension funds.

- [Fund Mailings](#) for the past year, including the Annual Funding Notice and letters mailed to all participants.

Participants who have [registered](#) on the Fund website can also access the following by logging into the [Participant Portal](#) and clicking on "Financial Information":

- **The Fund's most recent summary Investment Advisor Report.** This quarterly report details the Fund's different investments and their performance. Any participant may request the full investment advisor report by submitting the document request forms described below.
- **Document Request Forms** that participants may submit to access any of the more than 900 documents and reports detailing the Fund's current and past financial status.

By providing information about the Fund in a variety of different mediums, we hope that you will find the right resource to suit your needs.

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