

AASBCR® BENEFIT ISSUE

RETIREE TO COMPLETE THE FOLLOWING INFORMATION

DATE SUBMITTED :

RETIREE FIRST NAME, MIDDLE, LAST :

PREFERRED CONTACT NUMBER :

ADDRESS :

CITY/ST/ZIP :

PLEASE PROVIDE SPECIFIC DETAILS OF THE PROBLEM. INCLUDE DATES, TIMES, NAMES OF PEOPLE RETIREE CONTACTED IN AN EFFORT TO RESOLVE THE ISSUE.

AASBCR® TO COMPLETE THE FOLLOWING

CASE NUMBER :

DEPARTMENT/COMPANY RESPONSIBLE

AON____ YSA____ BENEFIT CENTER____ FIDELITY____

RETIREE DISCOUNT CENTER____

OTHER LIST :

AASBCR® SUBMITTED COMPLETED FORM TO :

EXPECTED REPLY DATE :

AASBCR® CONTACT :

AASBCR® EMAIL :

AASBCR® RETIREE BENEFIT ISSUE PROCESS

PLEASE OPEN THE DOCUMENT WITH THE FREE ADOBE ACROBAT READER. MAKE SURE TO HAVE A CURRENT VERSION. IF SO, WITH THIS FORM OPEN, LOOK TO THE RIGHT, SCROLL DOWN TO SEE "FILL IN & SIGN" USE THAT TO ADD TO THE DOCUMENT.

When referring benefit issues to AASBCR®, the AASBCR® Benefit Directors should be the last stop. Retirees must do their due diligence first. Follow these steps:

- 1) Discuss issue with the proper service provider (Aon, Fidelity, the Benefit Center, etc). Ask questions to prompt details such as what, when, where, why. Document a complete description of the issue. Collect the names of all the people you speak with, as well as the dates and times of the calls. Document their response.
- 2) If the answer sounds wrong, ask to speak to a manager. If told no manager is available, ask for a call back and get the manager's name and a phone number.
- 3) If no call back is made OR if the manager restates the same answer that you consider wrong, then request assistance from the AASBCR® Benefit Directors.
- 4) Fill out page 1 of this form. As you type in the form, you will need to hit the return key at the edge of the document since the form doesn't do auto return. Make sure the answers to the above 3 questions are included. Save the form as a pdf file. Return page 1 of the form to info@AASBCR.org
- 5) Under specific details, if your story is longer than 1 paragraph, just attach it as a separate document and return with page 1.