

UNION MEMBER RIGHTS PACKET

FILE YOUR BECK OBJECTION • KNOW WHERE YOUR DUES GO • ASK ABOUT THE
HEALTH FUND • DEMAND THE AUDIT

Provided free by K8E-AI.COM — Your dues. Your rights. Your money.

HOW TO USE THIS PACKET: Fill in your information below. Check the boxes for the requests you want to make. Sign and date it. Send one copy to your union local (certified mail, return receipt requested, is strongly recommended), keep one copy for your records. Section 3 goes to your health/welfare fund's Plan Administrator — the address is on your benefits paperwork. You do not need anyone's permission to send these letters. These are established rights.

MEMBER INFORMATION

Name: _____ Date: _____

Home Address: _____

Employer: _____ Job Title: _____

Union Name & Local Number: _____

Member ID / Book Number (if known): _____

SECTION 1 — BECK OBJECTION NOTICE

To: The Secretary-Treasurer / Financial Officer of my Union Local

☐ Pursuant to my rights under *Communications Workers of America v. Beck*, 487 U.S. 735 (1988), and the National Labor Relations Act, I hereby **object to the collection and expenditure of my dues and fees for any purpose other than collective bargaining, contract administration, and grievance adjustment**. This includes, but is not limited to, political activity, lobbying, ideological causes, and organizing outside my bargaining unit.

Accordingly, I request in writing:

1. A **reduction of my dues/fees** to the portion chargeable to representational activities only;
2. An **itemized breakdown** of chargeable versus non-chargeable expenditures, verified by an independent auditor;
3. A description of the **procedure for challenging** the union's calculation;
4. Written confirmation of my objector status, and whether I must **renew this objection annually** or whether it is continuing.

If this union maintains a "window period" for objections, treat this letter as filed within the earliest available window and notify me of any procedural requirement in writing.

SECTION 2 — FINANCIAL DISCLOSURE REQUEST (WHERE MY DUES GO)

To: The Secretary-Treasurer / Financial Officer of my Union Local

☐ Pursuant to the Labor-Management Reporting and Disclosure Act (LMRDA), I request a copy of this local's **most recent annual financial report (Form LM-2, LM-3, or LM-4)** as filed with the U.S. Department of Labor's Office of Labor-Management Standards.

☐ Pursuant to **29 U.S.C. § 431(c)**, I request, for just cause, to **examine the books, records, and accounts** necessary to verify that report — including officer salaries and allowances, expense reimbursements, payments to vendors and consultants, and disbursements for political or lobbying activity.

Note: Union LM reports are also public — any member can look them up free at the Department of Labor's OLMS Online Public Disclosure Room (olmsapps.dol.gov). Check what your local reported, then compare it to what you're told.

SECTION 3 — HEALTH & WELFARE FUND REQUEST (SEND TO PLAN ADMINISTRATOR)

To: The Plan Administrator of my Health & Welfare / Benefit Fund

☐ As a plan participant, and pursuant to **ERISA § 104(b)(4), 29 U.S.C. § 1024(b)(4)**, I request copies of the following plan documents:

1. The current **Summary Plan Description (SPD)**;
2. The **latest annual report (Form 5500)** with all schedules;
3. The most recent **Annual Funding Notice** and/or summary annual report;
4. The **trust agreement** and any other instruments under which the plan is established or operated.

Please note that ERISA requires the Plan Administrator to furnish these documents **within 30 days** of a written request, and that courts may impose penalties of **up to \$110 per day** for failure to do so. I am willing to pay reasonable copying costs as permitted by law.

SECTION 4 — AUDIT DEMAND

To: The President and Executive Board of my Union Local

☐ I formally request, in writing: **(a)** a copy of the most recent **independent audit** of this local's finances; **(b)** the name of the auditing firm and the date the audit was completed; and **(c)** the date the next audit is scheduled. If no independent audit has been performed, I request that the Executive Board authorize one pursuant to the union's constitution and bylaws, and I ask that this request be read into the minutes of the next general membership meeting.

SIGNATURE

I make the requests checked above as a member in good standing (or agency-fee payer, as applicable). Please direct all responses in writing to my home address listed on page 1.

Signature: _____ Date: _____

Printed Name: _____

RECORD OF DELIVERY (keep for your records)

Date mailed to Union Local: _____ Certified Mail #: _____

Date mailed to Plan Administrator: _____ Certified Mail #: _____

Response received (date): _____ Response received (date): _____

KNOW THE BACKGROUND

Beck (1988): The Supreme Court held that workers covered by a union-security clause cannot be compelled to pay for union activities unrelated to collective bargaining. Unions rarely advertise this. You have to invoke it — in writing.

LMRDA (1959): Passed after Senate hearings exposed union corruption. It gives every member the right to the local's financial reports, and — with just cause — the underlying books.

ERISA (1974): Your health fund is a legal trust. The trustees owe you a fiduciary duty, and the law puts a 30-day clock and a daily penalty behind your right to see the documents.

The audit: Most union constitutions require periodic audits. Asking when the last one happened, on the record at a membership meeting, is often the most revealing question a member can ask.

IMPORTANT: This packet is general information, not legal advice, and no attorney-client relationship is created by using it. Rights differ by sector and state: Beck applies to private-sector workers under the NLRA; railway and airline workers are covered by the Railway Labor Act; public-sector workers cannot be required to pay any union fees at all (*Janus v. AFSCME*, 2018); and in right-to-work states you cannot be required to pay dues or fees as a condition of employment. For your specific situation, consult a licensed attorney, the NLRB (nlr.gov, 1-844-762-6572), or the Department of Labor OLMS. Free legal aid for objectors is available from nonprofit worker-rights foundations.