

APPLICATION AND CERTIFICATION FOR OUT-OF-STATE SERVICE CREDIT

Check One:

- ERS
 TRS

Retirement Systems of Alabama
P. O. Box 302150 ♦ Montgomery, AL 36130-2150
334-517-7000 or 877-517-0020
www.rsa-al.gov

PART I MEMBER INFORMATION

Name: _____ **Date of Birth:** _____
First Middle Last Maiden

Social Security No.: _____ **Home Phone Number:** _____

Address: _____ **Work Phone Number:** _____
Street Address or P. O. Box

_____ **RSA Account Number:** _____
City State Zip (If known)

Please complete the following information: (Use one form for **each** former employer)

- Out of State Employer: _____
- Total Service: _____
- Were you covered by a Public Retirement System or Plan? _____
- Are you entitled to receive any benefit based on this service other than Social Security? _____
- If yes, what benefit? _____

I hereby request and authorize the release of information requested on this form and any information necessary in establishing my claim for out-of-state service.

Member's signature _____

PART II FORMER OUT-OF-STATE EMPLOYER INFORMATION

List by scholastic year or fiscal year to a maximum of ten (10) years

Name of Employing Unit	Number of months worked	Term of Service		Length of contract year	Time Basis (Full, ¾, ½, ¼)
		From M/D/Yr	To M/D/Yr		

Did the member receive credit for this service under any supplemental retirement or pension plan including but not limited to TIAA-CREF which was funded wholly or partly from public funds, other than Social Security? _____

If yes, please list the names _____.

Signature of Certifying Official

Out-of-State Employer

Printed name / Official Title

Address

Date

City / State / Zip code

Please forward this form to the public retirement system or plan which provided coverage for this employee for completion of Part III.

INSTRUCTIONS AND CHECKLIST FOR PURCHASING OUT-OF-STATE SERVICE

An active and contributing member of the Teachers' Retirement System (TRS) with ten years contributing membership service may purchase up to ten years of out-of-state service in public education or public employment. Service credit must have been established with another state public pension plan and either withdrawn, terminated, canceled or forfeiture declaration made (this usually means your funds have been withdrawn and returned to you).

You may purchase out-of-state service in increments of not less than one year (unless your total service or balance is less than one year). The deadline for purchasing out-of-state service is the effective date of your retirement. The cost for this service is calculated on the actuarial value of this service based on your age, average salary, total service at the time of your purchase, and the time remaining until your earliest retirement eligibility date.

Members are not eligible to purchase credit for out-of-state service if at the time of retirement the member is entitled to receive any benefits whatsoever for the same service under any other retirement or pension plan except Social Security.

Steps required:

1. Complete Part I – Member Information.
2. Send this form to your Out-of-State Employer for completion of Part II.
3. Out-of-state Employer must complete Part II and forward to Out-of-State Retirement System.
4. Out-of-state Retirement System must complete Part III and forward it to the TRS.
5. TRS of Alabama will calculate your cost and notify you.
6. Payment must be made and in the TRS office prior to your effective date of retirement or date stated in your notification.
7. Your purchase will be audited after the close of the scholastic year in which the purchase is completed.