



Application and Certification for Out-of-State Service Credit

Retirement Systems of Alabama
PO Box 302150, Montgomery, Alabama 36130-2150
877.517.0020 • 334.517.7000 • www.rsa-al.gov



Your SSN _____

Check One: TRS ERS

Your Information

PART I

Name _____
First Middle/Maiden Last

Mailing Address _____
Street or P.O. Box Apt.# City State ZIP Code

Telephone Number _____ Email Address _____

Date of Birth _____ PID (optional) _____

Service Information

Please use one form for each former employer.

Out-of-State Employer _____

Total Service

Were you covered by a Public Retirement System or Plan? Yes No

Are you entitled to receive any benefit based on this service other than Social Security? Yes No

If yes, what benefit? _____

Member Authorization

Sign Here →

Member

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.

Your Signature _____ Date _____

Former Out-of-State Employer Information

PART II

List by scholastic year or fiscal year to a maximum of ten years.

Employing Unit Name	Total Months Worked	Terms of Service		Length of Contract Year	Time Basis (Full, 3/4, 1/2, 1/4)
		From M/D/Y	To M/D/Y		

Former Out-of-State Employer Certification

Please forward this form to the public retirement system or plan which provided coverage for this employee for completion of page 2.

Did the member receive credit for this service under any supplemental retirement or pension plan including but not limited to TIAA which was funded wholly or partly from public funds, other than Social Security? Yes No

If yes, please list names _____

Out-of-State Employer Name _____

Address _____
Street or P.O. Box City State ZIP Code

Name and Title _____
Please Print

Sign Here →
Certifying Official

Signature _____ Date _____

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This page to be completed by former Out-of-State Retirement System.

Name _____ SSN _____

Out-of-State Public Retirement System

PART III

The person named in Part I of this form is an active member of the Retirement Systems of Alabama and wishes to establish credit for their out-of-state service as reported in Part II of this form. Alabama law does not permit the purchase of out-of-state service credit by members who, at the time of retirement, have credit for or are entitled to any benefits whatsoever for the same service under any other retirement or pension plan except Social Security. Therefore, to assist us in helping this member establish their out-of-state service, please check the appropriate answers to the questions below regarding membership in your system.

1. Did this person establish credit for the service listed on the front side of this form with your retirement system?

Yes No

2. Is the member receiving or entitled to receive a benefit from your state based on this service?

Yes No

3. If the member does not return to work in your state, will he/she be able to receive a benefit from your system?

Yes No

If yes, when will the member be eligible to begin drawing the benefit? _____

Month Day Year

4. Has this member's credit been canceled in your system?

Yes No

5. Does this member have credit in your system from another state?

Yes No

If so, please indicate the state(s) and years(s). _____

6. Has this service been certified to another state? (indicate below)

Comments _____

Name of Retirement System _____

Address _____
Street or P.O. Box City State ZIP Code

Telephone Number _____

Name and Title _____
Please Print

Sign Here →

*Out-of-State
Public Retirement
System
Representative*

Signature _____ **Date** _____

Please return completed form to:

The Retirement Systems of Alabama
P.O. Box 302150
Montgomery, AL 36130-2150
Fax: 334.517.7001

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Instructions and Checklist for Purchasing Out-of-State Service

An active and contributing member of the Retirement Systems of Alabama (RSA) 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 public retirement system and either withdrawn, terminated, canceled, or forfeiture declaration made (this usually means your funds have been withdrawn and returned to you).

If you have not withdrawn your funds with that public retirement system, you may transfer the funds directly to the RSA as part of your purchase cost. The public retirement system must provide documentation that the service has been canceled. If this transfer does not cover the cost of your purchase, then you can transfer the remaining funds from a different source or pay by personal check or money order. The RSA is unable to accept funds that exceed the cost of the purchase. If the purchase is not completed by the deadline, the RSA will cancel the purchase and return the funds to the original source.

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 to the RSA.
5. The RSA will provide you with a cost letter.
6. Payment must be received by the RSA prior to your effective date of retirement or the deadline stated in your cost letter, whichever is earliest.
7. Your purchase will be audited after the close of the plan year in which the purchase is completed.