NET-2 (3/16)



### **NEW YORK STATE TEACHERS' RETIREMENT SYSTEM**

10 Corporate Woods Drive, Albany, NY 12211-2395 (800) 348-7298 or 447-2900 (Albany-area calls); Membership Ext. 6190

APPLICATION FOR MEMBERSHIP

Please Provide All Requested Information

OFFICE SERVICES ONLY

PART 1 — TO BE COMPLETED BY APPLICAN	NT	
Social Security Number	 EmplID #	
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PART 2 — TO BE COMPLETED BY EMPLOYE	FR (Refer to Section 1 of the NYSTRS F	imployer Manual at NYSTRS ora)
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Mandatory Membership		Membership in NYSTRS is restricted to teachers as defined by Section 501-4 of
1 First date of full-time service		the Education Law. Teachers must be in "UNCLASSIFIED SERVICE" pursuant to
 M	Month Day Year	Section 35 of the Civil Service Law. (As not
OP	······································	all "unclassified" positions are reportable to NYSTRS, please contact the State Education
Ophorial Membership		Department for guidance if necessary.)
<ul><li>The earliest month in which:</li><li>A. Both service was rendered and</li></ul>		Note: In cases that are not clear to either
the application was notarized	/   0   1   /	Civil Service or the State Education Department, the Retirement Board shall
(Service can be rendered after the month of notarization.)  M	Aonth Day Year	determine whether a person is a teacher as
OR	nomin Bay real	defined by law.
B. Member contributions were taken.		My signature certifies this employee
LOCATION CODE:		is eligible for NYSTRS membership as determined by Civil Service or the State
		Education Department.
1) PER DIEM SUB <u>OR</u> 2)	CURRENT YEAR EARNINGS:	SIGNATURE OF AUTHORIZED OFFICIAL
\$		

## **NYSTRS SERVICE CREDIT**

\* SIX IMPORTANT QUESTIONS \*

You are responsible for ensuring your records are complete and accurate. Failure to provide any of the following necessary information could result in the loss of or reduction in a future benefit.

For	for an explanation of questions 1-5, see page 6.														
1.	Are you now a member of another New York State (NYS) TES NO or New York City (NYC) public retirement system?														
	Name of Retirement System:														
_															
2.	Are you receiving a pension (monthly benefit) from another  NYS or NYC public retirement system?  YES  NO														
	If yes, is it a disability pension?														
lf '	If YES, provide the information below and then refer to page 6 for important membership eligibility information.														
	Name of Retirement System:														
	L         I														
3.	If you have <b>former membership service</b> that qualifies you to be														
	reinstated, do you elect reinstatement? This election is irrevocable.														
	If yes, in what system was your former service credited:														
	Name of Retirement System:														
	System Membership or Registration #:														
1	Do you wish to claim previous NYS or NYC public employment or YES NO														
7.	public teaching service not included in question 3?														
5.	Have you ever served in the armed forces of the United States?														
6.	Are you currently an active member of the														
	Optional Retirement Program (TIAA/VDCP)?														
	If yes, name the employer:														

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# If you need assistance in completing Part 4 (Designation of Beneficiary) of this application, please call (800) 348-7298, Ext. 6130.

#### **DESIGNATION OF BENEFICIARY**

- ♦ If you wish to name more than three beneficiaries, please ask your school business office for an additional Designation of Beneficiary (NET-11.4) form to complete and submit with this application.
- ♦ If you wish to designate a custodian for a minor, a testamentary trust, an intervivos trust, or a corporation, please contact us at (800) 348-7298, Ext. 6130 for instructions to properly complete the designation.
- For each beneficiary, be sure you have checked either primary or contingent.
- ♦ At least one beneficiary must be designated as primary.
- Contingent beneficiaries should be listed after the primary.
- ◆ Do not number beneficiaries.
- List <u>all</u> requested information for each beneficiary. For married women, use their given name (Mary Smith not Mrs. John Smith).
- An unborn child may not be named as a beneficiary.
- ♦ If you wish to name your estate as beneficiary, please write "MY ESTATE" on the beneficiary name line. We also suggest that you contact your tax advisor to determine if this designation is in your best interest.
- ◆ Percentage allocations for each category (primary or contingent) must equal 100%. Only whole number percentage designations are allowed.
- ♦ If your beneficiary designation is deemed invalid, we will update your beneficiary as your estate until a valid designation is filed.

#### **DEATH BENEFIT ELECTION**

Each new member of the Retirement System has death benefit coverage under Paragraph 2 of Section 606 of the Retirement and Social Security Law.

The Paragraph 2 death benefit is payable if death occurs while in active service. It provides one year's salary after a year of member service, increasing each year to a maximum of three years' salary after three or more years of member service. The benefit is reduced after age 60 by 4% per year, up to a maximum reduction of 40% at age 70. (Reductions begin at age 61; age is not rounded and the reduction is not prorated.)

Paragraph 2 also provides a survivor benefit after retirement. The death benefit in effect at the time of retirement is reduced to 50% during the first year of retirement, 25% during the second year of retirement, and 10% of the benefit in effect at age 60 (or at retirement, if earlier than age 60) for the third and future years.

Once we receive your membership application, we will send you an acknowledgement letter. To learn more about your membership, we urge you to read *Your First Look at NYSTRS* and the *Active Members' Handbook*, which are available in the Library at NYSTRS.org.

NYSTRS is required by state and federal laws to collect personal information and maintain records to ensure an accurate calculation of any benefits that may be payable. This information is disclosed only where authorized by law. Failure to provide all necessary information may interfere with timely payment of benefits.

NYSTRS' Privacy Policy identifies and describes the types of information collected and how the information is used. The complete policy is available at: https://www.nystrs.org/Privacy-Policy. For questions regarding the policy, email communit@nystrs.org or write to NYSTRS, Attn: Public Information Office, 10 Corporate Woods Drive, Albany NY 12211-2395.

#### QUESTION 1

If you have an active membership in one of the NYS or NYC public retirement systems shown below, you may be eligible to transfer that membership to this System. A transfer will bring all of your service credit, member contributions (if any) and original date of membership to your new Teachers' Retirement System membership.

#### NYS/NYC public retirement systems from which a transfer of membership is possible:

New York State and Local Employees' Retirement System (866-805-0990)

New York City Teachers' Retirement System (888-869-2877)

New York City Board of Education Retirement System (800-843-5575)

New York City Employees' Retirement System (877-669-2377)

New York State and Local Police and Fire Retirement System (866-805-0990)

New York City Police Pension Fund (866-692-7733)

FDNY Pension Bureau Fire Department (718-999-1189)

To request a transfer, please obtain forms and instructions from the appropriate retirement system(s) noted above.

#### **QUESTION 2**

If you are receiving a pension from any NYS or NYC Retirement System, you may need to suspend your monthly benefit to be eligible for a membership in this System. We strongly urge you to contact that system to determine the impact any employment may have on your retirement benefit.

#### **QUESTION 3**

If you held a previous membership in a New York State or New York City public retirement system, you may be eligible for reinstatement to an earlier date of membership. By answering **YES** to question 3, we will review your eligibility for reinstatement and advise you accordingly. If you are reinstated to a Tier 1 or 2 membership, there will be no cost to you and you will no longer be required to make member contributions. However, if you are reinstated to a Tier 3-6 membership, there is a cost associated with the reinstatement. Once processing has been completed for your reinstatement to a Tier 3 or 4 membership, and if you meet the requirements noted below for Article 19\*, you may then be eligible to have deductions stopped. We would notify your employer to stop withholding effective **July 1 of the school year in which your payment was received in the system**.

\*Article 19 of the Laws of 2000 eliminates mandatory deductions for any Tier 3 and 4 members once the member has attained **10 years of service or 10 years of membership**.

Generally, it is to your advantage to be reinstated to an earlier date of membership. **However, there are situations where it may not be in your best interest to elect reinstatement.** We urge you to contact NYSTRS at (800) 348-7298, Ext. 6250 to discuss the details of your reinstatement with a System representative.

Note: By checking YES you are electing tier reinstatement. A tier reinstatement election is irrevocable.

#### **QUESTION 4**

You may be eligible to receive prior service credit for New York State public service (full-time, part-time, or substitute work), including NYC, if such service was credited or would have been creditable in a New York State public retirement system. Visit our Web site at NYSTRS.org to obtain our claim and verification forms.

As a Tier 6 member, the following service is <u>not creditable</u> in our System:

- Out-of-state teaching service;
- Service for private or parochial schools, for the federal government or in armed forces dependent schools; or,
- ◆ Non-public service.

After the prior service has been verified and you have earned a minimum of two years of credit under this membership, you should contact us for the cost of purchasing any allowable service. The cost will be 6% of the salary received during the period of verified service plus 5% interest per year.

Credit cannot be allowed for any service for which you are now receiving a benefit or for which you will be eligible to receive a benefit from any other public retirement system, or the federal government.

Note: It is not necessary to check a box if all service was credited to a former membership AND you have elected tier reinstatement by checking box 3.

#### **QUESTION 5**

To initiate your claim for military service with this System, you will need to submit a copy of Form DD214, Armed Forces of the US Report of Transfer or Discharge.

If you do not have the DD214, contact:

National Personnel Records Center Military Personnel Records 1 Archives Drive St. Louis, Missouri 63138 Phone: (314) 801-0800

www.archives.gov/veterans/military-service-records