



The Research Foundation of State University of New York
REQUEST FOR RETIREMENT CREDIT BASED ON SUNY SERVICE

(to meet vesting service requirements and/or determine Research Foundation contribution tier)

PART I (Employee to complete all information)

Name: _____ Social Security No.: _____
 RF Appointment Date: _____ (MM/DD/YY) Address: _____
 City: _____ State: _____ Zip Code: _____

SUNY Campus	SUNY Contact (Bus. / Pers. Office)	Phone Number (Include Area Code)	SUNY Employment Period (from/to)

I have read the information on the attached form. I request that the Research Foundation of State University of New York credit the eligible service toward the Research Foundation Retirement Plan. I hereby authorize SUNY to release employment information to the Research Foundation as requested in *Part II* of this form.

Employee Signature: _____ Date: _____

PART II (SUNY campus to complete all information)

I certify that the individual named in *Part I* of this form was employed by SUNY at this location in a nonstudent capacity during the period _____ (MM/DD/YY) through _____ (MM/DD/YY). During this period, he/she worked _____% of a full-time schedule. *If hourly paid*, number of hours per week was _____.

Indicate period(s) of time in which there were changes in hours or percent(s) of time worked, termination date(s), and reappointment date(s). Attach separate sheet, if necessary.

Authorized Signature: _____ Phone No.: _____
 (Print Name/Title): _____ Date: _____

Please return completed form to (to be completed by operating location):

Name: _____
 Address: _____
 City: _____ State: _____ Zip Code: _____

Central Office Use Only

Approved (____ Yrs. ____ Hrs.) Disapproved Notes: _____

 _____ Date: _____

RETIREMENT PLAN INFORMATION AND INSTRUCTIONS FOR COMPLETING THE SUNY SERVICE CREDIT FORM

TO: RESEARCH FOUNDATION EMPLOYEES WITH SUNY SERVICE

Eligible employees participate in The Research Foundation of State University of New York Retirement Plan after they have worked at least 975 hours (37.5-hour workweek) or 1,000 hours (40-hour workweek) during the year following the date of hire. After participation begins, contributions are made to a nonvested retirement account on the employee's behalf. After 5 years of eligible service, the employee gains a vested right to these contributions. Under certain circumstances, the Research Foundation recognizes employment with SUNY (prior or concurrent service) in meeting requirements for participation and vesting in its retirement plan.

The Research Foundation of State University of New York Retirement Plan has four retirement contribution tiers, based on employment with the Research Foundation (RF). If a rehired employee's RF service was interrupted by more than 15 months, the contribution tier is determined by the most recent RF employment date. Under certain circumstances, the Research Foundation recognizes employment with SUNY in determining the RF retirement contribution tier.

Please review the information below to determine whether you should seek credit for SUNY service.

Retirement Plan Service Credit

- Service at State University of New York will be recognized only if it ended within the one-year period immediately prior to your RF appointment.
- Service at State University of New York will be recognized only if it was not interrupted by more than a twelve-month period.
- Service at State University of New York must have been in a nonstudent capacity.

Retirement Tier Service Credit

- Service at State University of New York must be in a nonstudent capacity.

In order to establish these credits:

Complete *Part I* (on the attached form) and return it to the office responsible for Research Foundation benefits administration at the operating location where you are employed.

That office will forward the form to SUNY.