

REQUEST FOR RETIREMENT SERVICE CREDIT BASED ON PRIOR EMPLOYMENT

SUNY
 Accredited College/University
 Research Organization
 Check only one box

PART I (Employee to complete all information)

Name _____	Social Security/Employee # _____	RF Appt Date _____
Address _____	City: _____	State _____ Zip Code _____

Former Employer (Name, Address, City, State, Zip)	Contact (Bus. / Pers. Office)	Phone Number (Include Area Code)	Employment Date (MM/DD/YY)

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 with my previous employer toward participation and vesting in the Research Foundation Retirement Plan. I hereby authorize my former employer to release employment information to the Research Foundation as requested in *Part II* of this form.

Employee Signature: _____ **Date:** _____

PART II (Former Employer to complete all information)

_____ is an employer defined as follows: (*check one*)
 (NAME OF INSTITUTION)

An accredited college or university, including SUNY in the United States accredited by:

Private, nonprofit Research organization (*check all that apply*):

incorporated in the United States under Section 501(c)(3) of the Internal Revenue Code.

the *primary* function of this organization is research.

I further certify that the individual named in *Part I* of this form was employed by this organization 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: _____ Research Foundation for SUNY Binghamton _____

Address: _____ HR and Payroll Office, PO Box 6000 _____

City: _____ Binghamton _____ State: _____ NY _____ Zip Code: _____ 13901 _____

Central Office Use Only

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

Processed by: _____ Date: _____

**RETIREMENT PLAN INFORMATION AND
INSTRUCTIONS FOR COMPLETING THE PRIOR SERVICE CREDIT
FORM**

**TO: NEWLY HIRED OR REHIRED RESEARCH
FOUNDATION EMPLOYEES**

All non-student RF employees working the required hours of service (975 hours (37.5-hour workweek) or 1,000 hours (40-hour workweek) shall participate in the Basic Retirement plan upon completing a waiting period of one year of qualified service.

Under certain circumstances, the Research Foundation recognizes employment with other organizations in meeting service requirements for participation and vesting in its basic retirement plan.

Please review the information below to determine whether you should seek retirement plan credit for service with an employer other than the Research Foundation.

Retirement Plan Service Credit

Continuous, non-student employment with an eligible employer immediately preceding your RF appointment will be considered for qualified service credit. In order to be qualified service, your employment must have terminated no more than one year before your RF appointment and must have been with:

An accredited college or university in the United States, including State University of New York or
A private, nonprofit research organization incorporated in the U.S. under section 501(c)(3) of the Internal Revenue Code. And the *primary* function of the organization must be research.

In order to establish this credit:

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 your former employer.

Rev. 05-MAR-13

¹ For Research Foundation (RF) appointments on or after April 1, 2000, SUNY employment immediately preceding RF employment shall be disregarded if it disadvantages an employee with earlier nonSUNY qualified service, which also has ended within the twelve-month period preceding RF employment.