



The Research Foundation of State University of New York
REQUEST FOR RETIREMENT SERVICE CREDIT
BASED ON PRIOR NonSUNY EMPLOYMENT
(service with an accredited college or university or a research organization)

PART I (Employee to complete all information)

Name: _____ Social Security No.: _____
RF Appointment Date: _____ (MM/DD/YY) 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)

I certify that _____ (Name of Institution) is an employer defined as follows:

(check one)

☐ An accredited college or university (other than 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: _____ Rosemary Tripi - Research Foundation Benefits Manage:

Address: _____ 120 Crofts Hall

City: _____ Buffalo State: _____ New York Zip Code: _____ 14260

Central Office Use Only

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

_____ Date: _____



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

TO: NEWLY HIRED OR REHIRED NONVESTED RESEARCH FOUNDATION EMPLOYEES

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 3 years of eligible service, the employee gains a vested right to these contributions.

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

If your last employer was an organization of the type listed below, you may be eligible for retirement plan credit based on nonstudent employment with that employer. This employment must have been immediately prior to your Research Foundation appointment and within one year prior to this appointment.¹

- an accredited college or university in the United States other than SUNY.
- a private, nonprofit research organization incorporated in the United States under Section 501(c)(3) of the Internal Revenue Code. The *primary* function of this 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. 12-JUNE-00

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.