

3309-1-43

Appendix B

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SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

300 E. BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 800-878-5853 • www.ohsers.org

EARLY RETIREMENT INCENTIVE

EMPLOYEE'S INTENT TO PARTICIPATE IN PLAN AND EMPLOYER'S ACCEPTANCE OF LIABILITY

EMPLOYEE
PORTION

I, _____, _____,
EMPLOYEE NAME SOCIAL SECURITY NUMBER

hereby request service credit be purchased for me under the Early Retirement Incentive plan adopted in accordance with Section 3309.33 of the Ohio Revised Code. I have attained age 57 and understand that I must retire within 90 days after receipt of notice from the School Employees Retirement System of Ohio (SERS) that service credit has been purchased in my behalf or I will forfeit the right to such credit.

I authorize release of necessary information by SERS to my employer in connection with the retirement incentive plan.

Signature _____ Date _____

EMPLOYER
PORTION

The above named employee is considering retirement under our retirement incentive plan. The effective date of retirement will be

DATE

Please certify the total cost of purchasing _____ year(s) of service for the above named employee. NUMBER OF YEARS

We accept the liability for purchase of the above listed service credit.

Signature _____ District Name _____
AUTHORIZED OFFICER

Date _____ District Number _____

Address _____

Phone (____) _____

This form should be submitted no earlier than 90 days before the employee's retirement date, and no later than the earlier of the retirement date or expiration date of the plan.