

# GENESEO Retirement Program Election Form

I hereby acknowledge that I have been informed by my employer, SUNY Geneseo, that as a matter of right, I may elect to join a Retirement System as appropriate for my position. This form must be submitted to the Office of Human Resources within 30 days of your initial date of eligible appointment. Additionally, applicable enrollment forms and processes need to be completed within 30 days of your initial date of eligible appointment.

I hereby elect to participate in the retirement program specified below and/or am already a member of the specified program listed. I also understand that if I am currently a member of a retirement system I must continue to make contributions to that system.

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- 1. **New York State Teachers Retirement System (TRS)**
  - I have completed the Membership Application (RS5420)
  - I am already a member (Please complete information on page 2 of this form)
  
- 2. **New York State and Local Retirement System (ERS)**
  - I have completed the Membership Application (NET-2)
  - I am already a member (Please complete information on page 2 of this form)
  
- 3. **SUNY Optional Retirement Program**
  - I am already a member of the SUNY Optional Retirement Program  
(Please complete information on page 2 of this form)
  
- 4. **I have been advised of my eligibility and elect to decline membership in a retirement system at this time.** (Only for non-mandatory positions)
  
- 5. **I am currently retired and receiving a NYS pension or from an optional retirement program\***
  - TRS
  - ERS
  - \*SUNY ORP (TIAA, Fidelity, Voya, Valic)  
(Please complete information on page 2 of this form)

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

# Retirement Program History Sheet

This form is used to communicate prior participation in a retirement system.

1. Have you ever been a member of the SUNY Optional Retirement Program?  Yes  No

| Name of Campus | Title of Position | Full or Part Time | From<br>mm/dd/yyyy | To<br>mm/dd/yyyy | Contract Number |
|----------------|-------------------|-------------------|--------------------|------------------|-----------------|
|                |                   |                   |                    |                  |                 |
|                |                   |                   |                    |                  |                 |

2. Do you currently own a TIAA, Voya, Valic, or Fidelity basic retirement annuity contract to which employer contributions are made?  Yes  No

| Name of Vendor | Contract Number | Contributing Employer |
|----------------|-----------------|-----------------------|
|                |                 |                       |
|                |                 |                       |

3. Are you presently a member of the New York State Employees' Retirement System (ERS)\* or the New York State Teacher's Retirement System (TRS)?  Yes  No

| Name of Retirement System | Membership Number | Membership Date<br>mm/dd/yyyy |
|---------------------------|-------------------|-------------------------------|
|                           |                   |                               |
|                           |                   |                               |

4. Are you presently receiving a retirement benefit from any public Retirement System of NYS?  Yes  No

| Name of Retirement System | Date of Retirement |
|---------------------------|--------------------|
|                           |                    |

\* If yes, and you desire to join the ORP but have less than ten years of service credit, contact your Human Resources office and request Form ORP4. Attach that form to this one when sending.