



# Kindergarten Through Grade 12

## INSTRUCTIONS FOR COMPLETING THIS APPLICATION TO PURCHASE OHIO-VALUED CREDIT For Defined Benefit Plan Participants

This packet contains two forms, *Employer Certification* and *Retirement System Certification*, for your use in obtaining certification of the possible purchase of service credit listed below. To expedite the processing of your application to purchase Ohio-valued credit, follow the instructions carefully for obtaining certification of service. Eligibility requirements are outlined in our *Purchasing Service Credit* brochure. Incomplete or improperly certified forms are not acceptable for evaluation by STRS Ohio and will be returned directly to the member.

### Eligible service:

1. Teaching in a **public** school in another state.
2. Teaching in a **private** school in the United States.
3. Teaching in a school operated by or for the U.S. government.

### You cannot purchase credit in STRS Ohio for:

1. Service in preschools, day care centers, trade and self-improvement schools.
2. Any service for which you are eligible for a benefit under any other retirement or annuity plan (except Social Security) paid in the past, currently being paid or payable in the future.

## PROCEDURES TO OBTAIN CERTIFICATION

### Employer Certification

**PART 1** — To be completed by the member. All sections must be completed. Your signature is required.

**PART 2** — To be completed by the official employer or custodian of records for the service you wish to purchase. Certification must be made from actual payroll or retirement records verifying your service. Instruct the certifying official to return the form to you.

### Retirement System Certification

**PART 1** — To be completed by the member. All sections must be completed. Your signature is required.

**PART 2** — To be completed by the retirement system if contributions were made to a retirement plan for this service. This form must be sent to the appropriate retirement system if (1) the service was performed in a public institution or a parochial school, or (2) if the certifying official on the *Employer Certification* form indicated there was a retirement program (except Social Security) in effect for your service. Instruct the certifying official to return the form to you.

If you were not in a public institution and the *Employer Certification* form indicates there was no retirement plan in effect for your service, you do not need to have the *Retirement System Certification* form completed.

**After the forms are completed, make a copy for your records; then return the original copy of both the *Employer Certification* form and the *Retirement System Certification* form (if appropriate) in the same envelope.**

## TEACHER RETIREMENT SYSTEMS

**The Retirement Systems of Alabama**  
P.O. Box 302150  
Montgomery, AL 36130-2150  
(877) 517-0020  
www.rsa-al.gov

**Alaska Teachers Retirement System**  
Division of Retirement and Benefits  
P.O. Box 110203  
Juneau, AK 99811-0203  
(800) 821-2251  
www.doa.alaska.gov

**Arizona State Retirement System**  
P.O. Box 33910  
Phoenix, AZ 85067-3910  
(800) 621-3778  
www.azasrs.gov

**Arkansas Teacher Retirement System**  
1400 W. Third St.  
Little Rock, AR 72201  
(800) 666-2877  
www.artrs.gov

**California State Teachers' Retirement System**  
P.O. Box 15275  
Sacramento, CA 95851-0275  
(800) 228-5453  
www.calstrs.com

**Colorado Public Employees Retirement Association**  
P.O. Box 5800  
Denver, CO 80217-5800  
(800) 759-7372  
www.copera.org

**Connecticut Teachers' Retirement Board**  
765 Asylum Ave.  
Hartford, CT 06105-2822  
(800) 504-1102  
www.ct.gov/trb

**Delaware Office of Pensions**  
McArdle Building  
860 Silver Lake Blvd., Suite 1  
Dover, DE 19904-2402  
(800) 722-7300  
www.delawarepensions.com

**Florida Division of Retirement**  
P.O. Box 9000  
Tallahassee, FL 32315-9000  
(888) 738-2252  
www.dms.myflorida.com

**Teachers Retirement System of Georgia**  
Two Northside 75, Suite 100  
Atlanta, GA 30318  
(800) 352-0650  
www.trsga.com

**Employees' Retirement System of Hawaii**  
201 Merchant St., Suite 1400  
Honolulu, HI 96813-2980  
(808) 586-1735  
www.ers.hawaii.gov

**Public Employee Retirement System of Idaho**  
P.O. Box 83720  
Boise, ID 83720-0078  
(800) 451-8228  
www.persi.idaho.gov

**Teachers' Retirement System of Illinois**  
P.O. Box 19253  
Springfield, IL 62794-9253  
(800) 877-7896  
www.trs.illinois.gov

**Illinois State University Retirement System**  
P.O. Box 2710  
Champaign, IL 61825-2710  
(800) 275-7877  
www.surs.com

**Indiana Public Retirement System**  
One North Capitol, Suite 001  
Indianapolis, IN 46204  
(888) 286-3544  
www.in.gov/inprs/

**Iowa Public Employees Retirement System**  
P.O. Box 9117  
Des Moines, IA 50306-9117  
(800) 622-3849  
www.ipers.org

**Kansas Public Employees Retirement System**  
611 S. Kansas Ave., Suite 100  
Topeka, KS 66603-3869  
(888) 275-5737  
www.kpers.org

**Kentucky Teachers' Retirement System**  
479 Versailles Road  
Frankfort, KY 40601-3868  
(800) 618-1687  
www.ktrs.ky.gov

**Teachers Retirement System of Louisiana**  
P.O. Box 94123  
Baton Rouge, LA 70804-9123  
(877) 275-8775  
www.trsl.org

**Maine Public Employees Retirement System**  
P.O. Box 349  
Augusta, ME 04332-0349  
(800) 451-9800  
www.maineprs.org

**Maryland State Retirement System**  
120 E. Baltimore St.  
Baltimore, MD 21202  
(800) 492-5909  
www.sra.state.md.us

**Massachusetts Teachers' Retirement System**  
One Charles Park, 2nd Floor  
Cambridge, MA 02142-1206  
(617) 679-6877  
www.mass.gov/mtrs

**Michigan Public School Employee Retirement System**  
P.O. Box 30171  
Lansing, MI 48909-7671  
(800) 381-5111  
www.michigan.gov/orsschools

**Minnesota Teachers Retirement Association**  
60 Empire Drive, Suite 400  
St. Paul, MN 55103-4000  
(800) 657-3669  
www.minnesotatra.org

**Mississippi Public Employees' Retirement System**  
429 Mississippi St.  
Jackson, MS 39201-1005  
(800) 444-7377  
www.pers.ms.gov

**Public School & Education Employee Retirement Systems of Missouri**  
P.O. Box 268  
Jefferson City, MO 65102-0268  
(800) 392-6848  
www.psr-speers.org

**Montana Teachers' Retirement System**  
P.O. Box 200139  
Helena, MT 59620-0139  
(866) 600-4045  
www.trs.mt.gov

**Nebraska Public Employees Retirement System**  
P.O. Box 94816  
Lincoln, NE 68509-4816  
(800) 245-5712  
www.npers.ne.gov

**Public Employees Retirement System of Nevada**  
693 W. Nye Lane  
Carson City, NV 89703  
(866) 473-7768  
www.nvprs.org

**New Hampshire Retirement System**  
54 Regional Drive  
Concord, NH 03301-8507  
(877) 600-0158  
www.nhrs.org

**New Jersey Division of Pensions and Benefits**  
P.O. Box 295  
Trenton, NJ 08625-0295  
(609) 292-7524  
www.state.nj.us/treasury/pensions

**New Mexico Educational Retirement Board**  
P.O. Box 26129  
Santa Fe, NM 87502  
(505) 827-8030  
www.nmerb.org

**New York State Teachers' Retirement System**  
10 Corporate Woods Drive  
Albany, NY 12211-2395  
(800) 348-7298  
www.nystrs.org

**North Carolina Teachers and State Employees Benefit Trust**  
325 N. Salisbury St.  
Raleigh, NC 27603  
(877) 627-3287  
www.nctreasurer.com

**North Dakota Retirement and Investment Office**  
P.O. Box 7100  
Bismarck, ND 58507-7100  
(800) 952-2970  
www.nd.gov/rio

**Oklahoma Teachers Retirement System**  
P.O. Box 53524  
Oklahoma City, OK 73152-3524  
(877) 738-6365  
www.ok.gov/TRS

**Oregon Public Employees Retirement System**  
P.O. Box 23700  
Tigard, OR 97281-3700  
(888) 320-7377  
www.oregon.gov/PERS

**Pennsylvania Public School Employees' Retirement System**  
5 N. 5th St.  
Harrisburg, PA 17101-1905  
(888) 773-7748  
www.pasers.state.pa.us

**Puerto Rico Retirement System for Teachers**  
P.O. Box 191879  
San Juan, PR 00919-1879  
(787) 777-1414  
www.srm.pr.gov

**Puerto Rico University Retirement System**  
P.O. Box 21769  
San Juan, PR 00931-1769  
(787) 751-4550  
www.retiro.upr.edu

**Employees' Retirement System of Rhode Island**  
50 Service Ave.  
Warwick, RI 02886  
(401) 462-7600  
www.ersri.org

**South Carolina Retirement Systems**  
P.O. Box 11960  
Columbia, SC 29211-1960  
(803) 737-6800  
www.retirement.sc.gov

**South Dakota Retirement System**  
P.O. Box 1098  
Pierre, SD 57501-1098  
(888) 605-7377  
www.sdrs.sd.gov

**Tennessee Consolidated Retirement System**  
15th Floor, Andrew Jackson Building  
502 Deaderick St.  
Nashville, TN 37243-0201  
(800) 770-8277  
www.treasury.tn.gov/tcrs

**Teacher Retirement System of Texas**  
1000 Red River St.  
Austin, TX 78701-2698  
(800) 223-8778  
www.trs.state.tx.us

**Utah Retirement Systems**  
560 E. 200 South  
Salt Lake City, UT 84102-2099  
(800) 695-4877  
www.urs.org

**Vermont State Teachers Retirement System**  
109 State St., Fourth Floor  
Montpelier, VT 05609-6200  
(802) 828-2301  
www.vermonttreasurer.gov

**Virginia Retirement System**  
P.O. Box 2500  
Richmond, VA 23218-2500  
(888) 827-3847  
www.varetire.org

**Washington State Department of Retirement Systems**  
P.O. Box 48380  
Olympia, WA 98504-8380  
(800) 547-6657  
www.dr.s.wa.gov

**West Virginia Consolidated Public Retirement Board**  
4101 MacCorkle Ave., SE  
Charleston, WV 25304  
(800) 654-4406  
www.wvretirement.com

**Wisconsin Department of Employee Trust Funds**  
P.O. Box 7931  
Madison, WI 53707-7931  
(877) 533-5020  
www.etf.wi.gov

**Wyoming Retirement System**  
6101 Yellowstone Road, Suite 500  
Cheyenne, WY 82002  
(307) 777-7691  
www.retirement.state.wy.us

**District of Columbia Retirement Board**  
900 7th St., N.W., Second Floor  
Washington D.C. 20001  
(202) 343-3200  
www.dcrb.dc.gov

## PRIVATE RETIREMENT SYSTEMS

**Archdiocese of Cincinnati**  
100 E. Eighth St.  
Cincinnati, OH 45202  
(513) 421-3131  
www.catholiccincinnati.org

**Diocesan Group Life and Pension Office**  
1404 E. Ninth St.  
Eighth Floor  
Cleveland, OH 44114  
(800) 869-6525  
www.dioceseflcleveland.org

**Diocese of Columbus**  
197 E. Gay St.  
Columbus, OH 43215  
(614) 228-2457  
www.colsdioc.org

**Diocese of Steubenville**  
P.O. Box 969  
Steubenville, OH 43952-5969  
(740) 282-3631  
www.diosteub.org

**Catholic Diocese of Toledo**  
1933 Spielbusch Ave.  
Toledo, OH 43604  
(419) 244-6711  
www.toledodiocese.org

**Diocese of Youngstown**  
144 W. Wood St.  
Youngstown, OH 44503  
(330) 744-8451  
www.doy.org

**Concordia Plan Services of The Lutheran Church — Missouri Synod**  
P.O. Box 229007  
St. Louis, MO 63122-9007  
(888) 927-7526  
www.concordiaplans.org

**Ohio Conference of Seventh Day Adventists**  
P.O. Box 1230  
Mount Vernon, OH 43050  
(740) 397-4665  
www.ohioadventist.org

# EMPLOYER CERTIFICATION APPLICATION TO PURCHASE OHIO-VALUED CREDIT For Defined Benefit Plan Participants

**Kindergarten  
Through  
Grade 12**

## PART 1 (To be completed by member.)

Member's name \_\_\_\_\_ Member's Social Security number or STRS Ohio account number \_\_\_\_\_

Address \_\_\_\_\_ Date of birth \_\_\_\_\_  
Street

\_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_  
City State ZIP code Area code

Member's signature \_\_\_\_\_ Email address \_\_\_\_\_

Are you currently or have you contributed to:  Ohio Public Employees Retirement System (OPERS)  
 School Employees Retirement System of Ohio (SERS)

## PART 2 (To be completed by the official employer or custodian of records.)

*Employment must have been for a period of at least 12 consecutive weeks.*

Complete name of school \_\_\_\_\_

School address \_\_\_\_\_  
Street City State ZIP code

Type of school It was (check all that apply):

Public  An accredited elementary or high school  Other (describe): \_\_\_\_\_

Private  A preparatory school \_\_\_\_\_

A for-profit school \_\_\_\_\_

### Record of purchasable service (List each year of employment separately.)

Actual dates of service in each STRS Ohio fiscal year*						Position or title	Was this employment full time for the entire year? (yes or no)	Salaried Employment		Hourly Employment		Did position require teaching certificate? (yes or no)
From			To					Number of days employed within the school year	Days in normal year of employment	Number of hours employed within each school year	Number of hours in a normal year of employment	
Mo	Da	Yr	Mo	Da	Yr							

\*STRS Ohio Fiscal Years — Prior to 1974–75: September through August; 1974–75: September through June; 1975–76 and thereafter: July through June

**At the time service was performed:**

Did this school offer credit for courses that may have been transferred to other fully accredited public schools in Ohio?  Yes  No

What degree, advanced certification or license did this school offer its students? \_\_\_\_\_

Is there any type of retirement program (except Social Security) in effect now or in the future **for the service listed above**?  Yes  No

If yes, check the appropriate box below for the plan in which the member participated:

State or federal retirement system  Other \_\_\_\_\_

I certify the statements and information completed above are correct according to the official records I have examined:

Signature \_\_\_\_\_ Date \_\_\_\_\_  
Official employer or custodian of records

Print name \_\_\_\_\_

Title \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_  
Area code

Office \_\_\_\_\_

Office address \_\_\_\_\_  
Street City State ZIP code



## EMPLOYER CERTIFICATION

### Part 1

**To be completed by the member.**

### Part 2

**To be completed by the official employer or custodian of records.** (Form must be returned to member.)

### Important

The member must return this form and the *Retirement System Certification* form, if applicable, to STRS Ohio in the same envelope. There may be a delay in processing the certification request if both forms are not received by STRS Ohio at the same time.

**STATE TEACHERS RETIREMENT SYSTEM OF OHIO**

275 East Broad Street  
Columbus, OH 43215-3771

1-888-227-7877  
[www.strsoh.org](http://www.strsoh.org)

# RETIREMENT SYSTEM CERTIFICATION APPLICATION TO PURCHASE OHIO-VALUED CREDIT

For Defined Benefit Plan Participants

Kindergarten  
Through  
Grade 12

## PART 1 (To be completed by the member.)

Member's name \_\_\_\_\_ Member's Social Security number or STRS Ohio account number \_\_\_\_\_

Address \_\_\_\_\_ Date of birth \_\_\_\_\_  
Street

\_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_  
City State ZIP code Area code

I authorize release of information concerning my retirement account to the State Teachers Retirement System of Ohio.

Member's signature \_\_\_\_\_ Date \_\_\_\_\_

## PART 2 (To be completed by the retirement system in effect during the time the service that you wish to purchase was rendered.)

1. Was the applicant ever a member of your retirement system?  
 Yes  No If no, skip to number 4. If yes, please provide the information requested below. If additional space is needed, please photocopy this sheet and sign each additional sheet.

Dates of plan membership						Type of plan					Contributions made by (check one or both)	
From			To			Defined benefit	Defined contribution	DB/DC hybrid	Non-contributory	Optional retirement plan	Applicant	Employer
Mo	Da	Yr	Mo	Da	Yr							
						<input type="checkbox"/>	<input type="checkbox"/>					

2. Has the member withdrawn (refunded) his/her account with your system?  
 Yes  No
- If yes, please provide the following: Date withdrawn \_\_\_\_\_
- Source(s) of funds withdrawn (check all that apply):  Employee contributions  Employer contributions
- If checking "employer contributions," were 100% of those contributions refunded?  Yes  No

3. Is the member currently receiving or currently entitled to receive a retirement benefit from your system?  
 Yes  No
- If no, are there any conditions under which the member would be entitled to receive a retirement benefit from your system in the future?  
 Please explain: \_\_\_\_\_

If yes, please describe the type of benefit:

Monthly benefit

Lump-sum benefit (not a refund). Date of payment \_\_\_\_\_

Lump sum is the actuarial present value of the future retirement benefits.

Other. Please explain: \_\_\_\_\_

4. I certify the above statements are true to the best of my knowledge. **Return this certification form to the member. Do not submit to STRS Ohio.**
- Retirement system \_\_\_\_\_
- Street address \_\_\_\_\_
- City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_
- Signature \_\_\_\_\_ Date \_\_\_\_\_
- Print name \_\_\_\_\_
- Title \_\_\_\_\_ Phone (\_\_\_\_\_) \_\_\_\_\_  
Area code



*Return this form to member.*

# RETIREMENT SYSTEM CERTIFICATION

## Part 1

**To be completed by the member.**

## Part 2

**To be completed by the retirement system** in effect during the time the service that you wish to purchase was rendered. Instruct the certifying official to return the form to you.

## Important

The member must return this form and the *Employer Certification* form to STRS Ohio in the same envelope. There may be a delay in processing the certification request if both forms are not received by STRS Ohio at the same time.

**STATE TEACHERS RETIREMENT SYSTEM OF OHIO**

275 East Broad Street  
Columbus, OH 43215-3771

1-888-227-7877  
[www.strsoh.org](http://www.strsoh.org)



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# Purchasing Service Credit **Fact Sheet**

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## Teaching Service — Kindergarten Through Grade 12

### Section 3307.74, Ohio Revised Code

Credit for past employment that STRS Ohio members may purchase — also known as purchasable service credit — can be used to increase a member's service credit for retirement. Most types of private or public teaching or public employment for which the member did not contribute to an Ohio public retirement system are purchasable. There are numerous types of purchasable service, each with certain eligibility requirements. Most service credit purchases increase the amount of the retirement benefit. Sometimes the purchase of service credit allows a member to meet the age and service requirements for retirement earlier.

The enclosed form is used to certify teaching service rendered in K–12 public schools outside of Ohio, private schools in the United States and schools operated by or for the United States government in other countries. If this is not the type of service you want to certify, please call STRS Ohio toll-free at 1-888-227-7877 or visit [www.strsoh.org](http://www.strsoh.org) for a different certification form and fact sheet.

Because records are sometimes difficult to obtain, it is advisable to certify service credit as soon as possible. All of the information requested on the form is required so that eligibility for purchasing service can be determined promptly and accurately. A separate form must be completed by each employer for the service you wish to purchase.

The rest of this fact sheet gives important information about this type of purchasable service credit, such as how the cost is calculated and how much the purchase may increase your benefit at retirement.

### Eligibility requirements

1. Public teaching service outside Ohio must be such that, if rendered in Ohio, it would have been covered by STRS Ohio, SERS, OPERS, Ohio Police & Fire Pension Fund, or the Highway Patrol Retirement System.
2. To purchase private teaching service, both the school and the position must qualify. The position must be determined to be comparable to a position in a K–12 public school in Ohio.

#### **The school must:**

- Be recognized by an established accrediting association or governmental agency.
- Have educational credits that are recognized by a public school in Ohio.
- Be primarily oriented toward preparation for high school graduation. (*Preschools, day care centers, private schools oriented primarily to trades and occupations, and self-improvement schools do not qualify.*)



3. Out-of-country teaching service may be eligible for purchase if: the school was operated primarily for United States citizens, under the direct control of the U.S. government, by contract of a third party but under control of the U.S. government, or primarily a school for employees of the U.S. government or their dependents. If it was primarily a school for employees of the U.S. government or their dependents, at least 51% of the students must have been American dependents at the time the service was rendered. No private out-of-country service qualifies for purchase.
4. Credit can be purchased for full-time or regular part-time employment. All service must be at least 12 consecutive weeks with the same employer.
5. Credit may not be purchased for any service that was already used in the calculation or payment of a retirement benefit, or that is used in the calculation of a retirement currently being paid or payable in the future under any retirement program. A benefit from Social Security is permissible.
  - If participation was in a **defined benefit plan**, qualifying service may be purchased following certification by the plan administrator that there was a total withdrawal of funds and cancellation of all credit.
  - If participation was in a **defined contribution plan** for **less than five** separate fiscal years (beginning July 1 and ending June 30), qualifying service may be purchased following certification by the plan administrator that there was a total withdrawal of funds.
  - If participation was in a **defined contribution plan** during **each of five or more** separate fiscal years (beginning July 1 and ending June 30), qualifying service may be purchased following certification by the plan administrator that there was a total withdrawal of funds and the member was not entitled to all of the employer contributions.

***Example of service eligible for purchase:** An educator taught at a private or public school for less than five fiscal years, participated in a defined contribution plan and withdrew 100% of the funds.*

***Example of service not eligible for purchase:** An educator taught in a private or public school for five or more fiscal years and participated in a defined contribution plan. He or she withdrew all funds including both employee and employer contributions.*
6. If the annual retirement benefit will exceed the limits stated in Internal Revenue Code 415(b) and 415(c), the member will be eligible to purchase service credit only with pretax funds rolled in from a traditional IRA, 401(a) state-sponsored retirement plan, 403(b) tax-sheltered annuity or 457(b) deferred compensation plan maintained by a state or local government.

## Service credit

1. The maximum credit purchasable is five years total for these types of service: out-of-state public teaching, public service in another state or for the federal government, and any other service permitted by Section 3307.74, R.C. For each year of purchasable credit, the member must have at least one year of service in STRS Ohio.
2. The amount of credit eligible for this service is determined based on the number of days worked within a 180-day school year at the institution where the service was rendered.
3. If the school was a for-profit institution that meets the eligibility requirements and there is not at least 5.00 years of earned service credit with STRS Ohio, this service must be purchased with pretax funds.

## Cost information

A purchase of service credit can impact a member's benefit in one of the following three ways:

1. **Increase the retirement benefit** — A member who is already eligible for a retirement benefit without the purchase of credit may purchase credit to increase the amount of that benefit. For example, a member purchases one year of service credit to receive an additional 2.2% of the final average salary every year for the member's lifetime.
2. **Eliminate or lower the early retirement reduction** — Members may retire early with an actuarially reduced benefit based on years of service credit and age at retirement. Purchasing additional credit could help the member reach eligibility for unreduced benefits or lessen the actuarial reduction the member will incur due to an early retirement.
3. **Create retirement eligibility** — A member who is not yet eligible for a retirement benefit may purchase credit to reach eligibility. For example, a member who is one year away from reaching 30 years of service and retirement eligibility buys 1.00 year of credit during the 29th year of service to become eligible for retirement a year sooner. This type of purchase results in the highest cost.

Because purchasing credit may increase the amount of your retirement income and/or enable you to retire sooner, the amount you pay to purchase the credit reflects the additional liability to STRS Ohio resulting from your purchase.

Purchasable service at 100% liability must be purchased in whole-year increments. A member who certifies and purchases only a partial year of credit has the option to certify and purchase the balance of that year at a later time for no additional cost.

The cost for service credit is based on your salary multiplied by a factor that is based on your age and years of service credit. **For a cost estimate, go to [www.strsoh.org](http://www.strsoh.org) and click on "Calculators."**

## Calculating the retirement benefit with the purchased credit\*

1. This credit is considered noncontributing credit and is calculated at 2.2% of the final average salary (FAS). The FAS is usually the average of the three highest years of Ohio public earnings. If a member obtains 35 years of service in STRS Ohio using this credit, this credit will still be calculated at 2.2% of FAS.
2. The retirement benefit cannot exceed 100% of the FAS. Any service credit purchased that is not required for the maximum retirement benefit will be refunded to the member with no payment of interest for the time STRS Ohio held the funds.

## Completing the certification form

Both the employer and retirement system certification forms need to be returned to STRS Ohio in the enclosed envelope.

1. Employer certification
  - **Part 1 must be completed by you.** STRS Ohio requires the most current address information for our records. A signature allows us to consult with the certifying official and other Ohio retirement systems, if necessary, and certifies that the information provided is complete and accurate.

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*\*Members with 35 years of contributing service receive 2.5% of the final average salary (FAS) for the first 31 years of service, 2.6% for the 32nd year, 2.7% for the 33rd year and so on. Since this service is noncontributing, it cannot qualify a member for the higher 2.5% formula.*

*Beginning Aug. 1, 2015, the benefit formula will be **2.2% for all years of service** and the FAS calculation will be based on **the five highest years of earnings**.*



- **Part 2 must be completed by the current custodian of records for the former employer.** Ohio statute requires all of this information to determine the eligible amount of service credit and cost. Please ask the custodian to pay special attention to our fiscal year instructions on the certification form to get the maximum service credit available.
  - The custodian of records should return the form to you.
2. Retirement system certification
    - **Part 1 must be completed by you.** This is a release of information giving the retirement system authority to provide information about your account to STRS Ohio.
    - **Part 2 must be completed by the retirement system used by this employer at the time this service was rendered.**
    - Please direct the retirement system to return the form to you.

## STRS Ohio certification process and cost statement information

1. STRS Ohio will send a letter of acknowledgment to you after receiving the forms.
2. If the forms are completed correctly, a reply will be sent to you within 10–15 business days after STRS Ohio receives them.
  - If the service is eligible for purchase, a cost statement will be mailed. Carefully read the notes that may be printed across the bottom of the cost statement for specific information. The member will receive a lump-sum cost or an installment payment cost, or both, depending on the request.
  - If the service is not eligible for purchase or if additional information is required, you will be notified in writing.
3. The determination of eligibility to purchase service credit can be delayed by any of the following:
  - The certification forms are not completed correctly.
  - STRS Ohio does not receive both forms (one from the former school employer and one from the retirement system) at the same time.
  - The forms are not signed by the official custodian of records.
4. The service credit may be purchased within the valid period on the cost statement or another cost statement may be requested at a later date.
5. If the service credit is certified and at least one cost statement is issued before retirement, the member may purchase service credit up to three months after the effective retirement date, as long as the benefit calculation has not been finalized. For example, if the retirement effective date is July 1, service credit must be purchased by Sept. 30.

## Methods for purchasing service credit

- Lump-sum purchase may be made by check.
- Lump-sum purchase may be made with pretax rollovers or direct transfer of funds.
- A lump-sum tax-deferred payment will be accepted from an employer.
- Installment payments may be arranged with your employer. Some schools offer only pretax plans or after-tax plans, and some schools offer both plans.

***More information about the methods to purchase service credit will be mailed to you with the cost statement if the service is eligible for purchase.***

### Contacting STRS Ohio

**By phone:** 1-888-227-7877 (toll-free)

**Online:** [www.strsoh.org](http://www.strsoh.org)

**By email:** [ContactUs@strsoh.org](mailto:ContactUs@strsoh.org)

Our benefits counselors can provide more detailed information with one-on-one consultation in our Columbus office, through a TeleConference or during field counseling sessions held throughout the state each year. Call Monday–Friday, 8 a.m.–5 p.m. to schedule an appointment.