



INSTRUCTIONS

PLEASE READ CAREFULLY

You may submit this form if you are a Tier III, IV, or VI member and you are requesting a Cost Letter to purchase credit for the types of service listed below. (For *prior service* credit that TRS has previously verified as eligible for purchase, you may instead request a Cost Letter online, or use our Prior Service Calculator, after logging in to the secure section of our website.)

Types of Service for Which You May Purchase Credit

- | | |
|-------------------------------------|--|
| Prior service | Any creditable service you rendered with a New York City and/or New York State public employer before joining TRS that was not transferred to TRS. |
| Amman service | Regular substitute teaching and/or per diem service you rendered with a New York City public employer during a leave of absence from your TRS-eligible position or after separating from service. |
| Other NYC and/or NYS service | Other service you rendered with a New York City and/or New York State public employer during a leave of absence from your TRS-eligible position or after separating from service. Such service must be in a position that would not qualify you for TRS membership and that was not regular substitute teaching or per diem service. |
| Military service | Certain eligible military service that interrupted your employment.

<i>(Do <u>not</u> file this form to purchase credit for military service rendered during specified periods of military conflicts (i.e., Article 20 of the New York State Retirement and Social Security Law). Instead, please file a "Military Service Credit Request Form" (code SD68).)</i> |

Benefits of Purchasing Service Credit

- Your prospective service retirement allowance would be higher.
- If you are not vested, you may more quickly attain vested rights and qualify for retirement benefits.
- If you are a Tier III or IV member, purchasing service credit may also enable you to more quickly attain the years of credited service needed to stop or reduce the contributions you are making to the Qualified Pension Plan (QPP).

Crediting of Service

- Prior service would be credited after the service is verified by TRS, after you have completed at least two years of membership service, and upon payment.
- Amman and other NYC and/or NYS service would be credited after the service is verified by TRS, after you have completed at least two years of membership service, upon payment (if required), and upon return to active service in a TRS-eligible position.
- Military service would be credited after the service is verified by TRS, upon payment (if required), in accordance with relevant laws.

Documentation of Service

- **Prior service:** If you are claiming credit for prior service that TRS has previously verified as eligible for purchase, you do not need to resubmit documentation.
- **Amman and other NYC and/or NYS service:** Upon receipt of this form, TRS will contact your former employer(s) to verify your service. If you submit documentation to support your claim for service credit, your documentation must meet all of the following criteria:
 - ✓ The documentation must be on official letterhead from the employer for whom you rendered the service; **and**
 - ✓ The documentation must contain the exact time period(s) of service (*e.g.*, total hours or days worked) with a year-by-year breakdown; **and**
 - ✓ The documentation must show the status of your employment during the service rendered (*e.g.*, full-time or part-time); **and**
 - ✓ The documentation must detail your salary history and title(s) during the service rendered (*e.g.*, showing the effective date of any annual salary, hourly rate, or title changes).

Note: In certain cases, TRS may need to request additional documentation to determine whether your service is creditable.

- **Military service:** You must submit the following official documentation to verify your service:
 - ✓ A notice from your employer of your appointment in an eligible position; **and**
 - ✓ A notice of your entry into military service; **and**
 - ✓ A notice of your separation from military service (*i.e.*, the DD-214 military discharge form); **and**
 - ✓ A notice from your employer of your resumption of service in an eligible position.

Note: If you are claiming credit for military service rendered during a leave of absence without pay (*i.e.*, after becoming a TRS member), you must also submit a leave notice issued by your employer that clearly states the purpose for which the leave was granted and the period covered by the leave.

General Provisions

- If you intend to retire within the next 12 months, please indicate your expected date of retirement in Part B of this form.
- Your Cost Letter will be based only on the amount of creditable service that has been verified by your employer(s) and/or official documentation.
- If you already submitted documentation and/or if TRS already verified your service, you would not need to resubmit any information at this time unless you are claiming additional unverified service. If you are claiming credit for unverified Amman, other NYC and/or NYS, and/or military service, submit this form with your documentation. If you are claiming credit for unverified prior service, you should instead submit a "Record of Prior and/or Transferred Service Form" (code SB146) with your documentation.
- For a breakdown of your Total Service Credit, you may consult your latest Annual Benefits Statement (ABS) or submit a "Total Service Letter Request Form (For Tiers III, IV, and VI Members Only)" (code SB66).

Questions and Further Information

- For more information about service credit, please refer to the service credit brochures on our website.
- If you require additional assistance, please contact our Member Services Center at 1 (888) 8-NYC-TRS.



COST LETTER REQUEST FORM
FOR TIERS III, IV, AND VI MEMBERS



TEACHERS' RETIREMENT SYSTEM
OF THE CITY OF NEW YORK (TRS)
55 Water Street, New York, NY 10041
www.trsnyc.org • 1 (888) 8-NYC-TRS

Please read the instructions on pages 1 and 2 before completing this form.
(NOTE: Please print in black or blue ink, and initial any changes that you make on this form.)

PART A: All information must be provided.

First Name	MI	Last Name	Social Security Number (last 4 digits only)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> - <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Permanent Home Address	Apt. No.	TRS Membership Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
City	State	Zip Code	Primary Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
<input type="text"/>	<input type="text"/>	<input type="text"/>	(<input type="text"/> <input type="text"/> <input type="text"/>) <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
			Alternate Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
			(<input type="text"/> <input type="text"/> <input type="text"/>) <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please keep your personal information with TRS up to date. We will update our records based on the information you provide above, so *do not enter a temporary address*; instead, TRS suggests that you consult the U.S. Postal Service about having your mail forwarded on a temporary basis. To register any changes to your permanent address (and/or phone number), please access our website or file a "Member's Change of Address Form" (code DM13) with TRS.

If you are providing new information above, please indicate the effective date: //

PART B: To request a Cost Letter, please check the box below, indicate the type and period(s) of service for which you are requesting credit, and write your initials in the space provided. If you intend to retire within the next 12 months, please also indicate your expected date of retirement. (All dates should be in MM/DD/YYYY format.)

Expected date of retirement (if applicable): //

I hereby request that TRS send me a Cost Letter to purchase credit for the type of service I have indicated below.

Prior service

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:





Prior service (continued)

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:

Amman service

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:





Other New York City and/or New York State service

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:

Military service

Period: From // To //

Employer's name and address:

Period: From // To //

Employer's name and address:

PART C: Please read the following statement and sign and date this form below.

I hereby request that TRS send me a Cost Letter for the periods of service listed in Part B. I have read the instructions about "Documentation of Service" and am aware that I may need to submit documentation with this form in some cases. I certify that the information I have provided above is accurate to the best of my knowledge.

MEMBER'S SIGNATURE _____ DATE (MM/DD/YYYY) _____

