

The City University of New York

RETIREMENT PROGRAM ELECTION FORM
for Full-Time Instructional Staff/Civil Service Managers

This form is to be used for eligible employees of CUNY who are appointed, promoted, transferred or re-classified to an eligible instructional staff / Civil Service Managerial position and must be filed within 30 days of written notification of eligibility (for new employees, filing must occur within 30 days of appointment). For those electing the Optional Retirement Program (ORP), this election form must be accompanied by a TIAA/CREF Application to complete the election process. **Those staff failing to complete the election process within the statutory time frame noted above, are forced into membership with the NYCTRS by law (Civil Service Managers into the NYCERS).**

Section 1: Personal Information

Name: _____ Social Security Number: _____

Address: _____

College: _____ Job Title: _____ Pension Mem. No. (if any): _____

Section 2: Election of Retirement Program

Having received written notification of my retirement program options and having satisfied myself as to the desired retirement program available to me by or pursuant to law in connection with my employment by the City University of New York, I hereby make the following election in regard to my participation in the retirement program as specified below: (check one only)

- 1) ☐ **The Optional Retirement Program (ORP).** I have attached the required TIAA/CREF Regular Annuity Application materials;
- 2) ☐ **The New York City Teachers' Retirement System*** (Instructional Staff members only, unless already a member of the NYCTRS through a former position in public service);
- 3) ☐ **The New York City Employees' Retirement System*** (Classified Managers only, unless already a member of NYCERS through a former position in public service);
- 4) ☐ **The Board of Ed Retirement System*** (for current members only);
- 5) ☐ I have been appointed to a **Substitute** position, and **opt not to join the ORP**; therefore I choose not to be a member of a pension system at this time.

Employee Signature/Date

Verification by Personnel/Date

*Those participating as Transferred Contributors, please check here. ____

pnselec.wpd, 8/98

The City University of New York
Information Regarding Pension System Membership

I. Full-Time Instructional Staff (Including Exec. Comp, REM & Substitute titles):

All full-time instructional staff are eligible for membership in either the Optional Retirement Program (ORP), which refers to membership in TIAA/CREF and the Alternate Funding Vehicles, or the New York City Teachers' Retirement System (TRS). In some cases, an employee who is already a member of the New York City Employees' Retirement System (ERS) and who is appointed to a full-time instructional staff position may retain membership in ERS as a "transferred contributor", thereby revoking his/her rights to join any other public pension plan in the future. Regardless of choice, pension membership, with the exception of Substitutes, is mandatory for all full-time instructional staff. Substitutes can join the ORP only (unless they are Transferred Contributors of another public pension).

New instructional staff who are ERS members on a leave of absence from a civil service position must remain in ERS until they have relinquished their leave, generally upon attainment of 13.3b status in the Instructional staff position. Once this status is attained, the employee has sixty (60) days to 1) elect to remain in ERS, 2) transfer to TRS, or 3) elect membership in the ORP.

Any member of TRS or ERS who is eligible to elect membership in the ORP may be able to retain rights to a TRS or ERS retirement benefit even if normal vesting time frames have not been met, provided contributions to the system are not withdrawn. Please consult with your college personnel office for details.

II. Full-Time Civil Service Managers:

All full-time classified service personnel are required to join the New York City Employees' Retirement System after six months from gaining permanent status (those in provisional status may elect to join earlier). Civil Service Managers are also given the opportunity to join the Optional Retirement Program upon appointment to their position, pursuant to the rules cited in "I." above.

My signature below indicates that I have read the information above and have consulted with my college personnel office regarding any questions I may have had concerning my pension program options and rights.

Name	Signature/Date	Personnel Office Verification
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The information provided within this document is based upon currently available information and should not be considered the sole source of information regarding pension membership. In all cases, the provisions of governing laws, rules and regulations prevail.

(please attach to CUNY "RETIREMENT PROGRAM ELECTION FORM")