



Memorandum # 39/2003

Commonwealth of Massachusetts | Public Employee Retirement Administration Commission
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Joseph E. Connarton, *Executive Director*

MEMORANDUM

TO: All Retirement Systems

FROM: Joseph E. Connarton, Executive Director

RE: New/Revised General Membership & Disability Forms

DATE: December 5, 2003

Nine of PERAC's general membership and disability forms have been revised and two forms are being issued for the first time. Copies of these eleven forms are attached. The revised forms were initially introduced to retirement board members, administrators and staff who participated in PERAC's Pension Basics classes this fall. PERAC's Web Master is currently programming template versions of all of these forms so that users can largely complete them on-line (with the exception of fields for original signatures, some dates, investment account numbers, and in most cases, social security numbers) and print them. We anticipate posting these templates on PERAC's home page: www.mass.gov/perac within the next two weeks. In the meantime, please use the attached copies of the following forms:

General Membership

- *Application for Voluntary Superannuation Retirement*
- *Beneficiary Change Form (Option B) (If Member Dies After Retirement)*
- *Notice of Potential Benefits Pursuant to G.L. c. 32, §4(1)(h)*
- *Application for Withdrawal of Accumulated Total Deductions*
- *Pre-Tax Rollover Acknowledgement Form*
- *Employer's Certification in Connection with Termination Retirement Allowance Pursuant to G.L. c. 32, § 10(2) to be Filed with the Retirement Board*
- *Termination Retirement Transmittal to the Commission*

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TO: All Retirement Systems
FROM: Joseph E. Connarton, Executive Director
RE: New/Revised General Membership & Disability Forms
DATE: December 5, 2003

Disability

- *Member's Application for Disability Retirement*
- *Involuntary Retirement Application*
- *Employer's Statement Pertaining to a Member's Application for Disability Retirement*
- *Disability Transmittal to the Commission*

Please note that the *Beneficiary Change Form (Option B) (If Member Dies After Retirement)* and the *Pre-Tax Rollover Acknowledgement Form* are new forms. Also note that members who are retiring or taking withdrawals of their accumulated total deductions as well as the employer will now be required to provide information to assist the Board in applying G.L. c. 32, §15.

If you have any questions, please contact PERAC's Legal Unit at 617-666-4446, extension 907.