



State Retirement Board

ONE WINTER STREET, 8TH FLOOR, BOSTON, MA 02108

MSERS RETIREMENT ADVANCE REQUEST FORM

SCAN AND EMAIL COMPLETED APPLICATION TO: retirementadvance@tre.state.ma.us OR
MAIL TO: ONE WINTER ST., 8TH FLOOR, BOSTON, MA 02108
FAXED APPLICATIONS WILL NOT BE ACCEPTED

1. MEMBER INFORMATION (REQUIRED)

Name:	Last 4 of SSN:	or MSRB ID # (if known):
My effective retirement date is:	Date of Birth:	
Present Address:	Personal E-Mail Address:	
City:	State:	Zip:
Phone:		

2. TERMS AND CONDITIONS

The following are the terms and conditions for the request of an advance benefit payment:

- The member has applied and been found eligible for benefits and all required documentation related to the retirement application has been received by the Board.
- This Retirement Advance Request Form must be completed and submitted to the Board.
- The member has no outstanding payments due to the MSRB or to their employing agency.
- Requests for an advance will be reviewed by Board staff who will determine the final amount of any advance benefit payment that is approved.
- Any advance benefit payment shall be made in an amount determined by Board staff, but in an amount not to exceed 50% of the initial benefit payment.
- Electronic direct deposit of an advance benefit payment is not available.
- Any advance benefit payment made will be deducted from the initial benefit payment made by the Board.
- Eligible members may only request one benefit advance.
- Advances will not be available for members whose benefits are subject to qualified domestic relations orders, support orders, or properly executed liens.

I understand and agree to the terms and conditions outlined above for the application for a benefit advance. If approved, I authorize the Massachusetts State Retirement Board (“Board”) / Office of the State Treasurer to issue an advance payment in an amount to be determined by the Board.

3. MEMBER SIGNATURE (REQUIRED - FORM WILL NOT BE PROCESSED WITHOUT SIGNATURE)

SIGN HERE: X

MEMBER SIGNATURE

DATE

BELOW THIS LINE IS FOR BOARD USE ONLY

MSRB AUTHORIZED SIGNATORY

ADVANCE AMOUNT

DATE

E-mail completed form to: retirementadvance@tre.state.ma.us