



Participant Transfer Certification for Same Employer

Complete this form if the participant has taken a different position that is covered by a different division. Upon transfer, the participant becomes an active member of the new division as of the effective date.

Defined Benefit = DB, Defined Contribution = DC; Hybrid includes DB and DC parts

1. Participant information (completed by participant)

Last name*	First name*	MI	Last four digits of SSN*
Email address			Phone number (with area code)*

2. Transfer information (completed by employer)

Employer*	Employer number	
Employer contact name*	Contact phone	Employer email*

Effective date of transfer*

First day of (month): _____ (year): _____

Note: If actual employment transfer does not occur on the first of the month, the employer must select the first of the month after as the effective date of transfer.

The employer will have adopted either the Standard Transfer Provision OR the Plan Continuation Policy and should complete the appropriate section below.

Standard Transfer Provision

Previous Division Name of Division: _____ Division number: _____ Plan type: <input type="checkbox"/> DB <input type="checkbox"/> DC <input type="checkbox"/> Hybrid	New Division Under the Standard Transfer Rules , the participant must be placed in the open active plan for the division. Name of Division: _____ Division number: _____ Plan type: <input type="checkbox"/> DB <input type="checkbox"/> DC <input type="checkbox"/> Hybrid
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Plan Continuation Policy

Previous Division Name of Division: _____ Division number: _____ Plan type: <input type="checkbox"/> DB <input type="checkbox"/> DC <input type="checkbox"/> Hybrid	New Division Under Plan Continuation , the participant will be placed in the division of the same plan type, whether open or closed, if one exists. If not, they will be placed in an open division. Name of Division: _____ Division number: _____ Plan type: <input type="checkbox"/> DB <input type="checkbox"/> DC <input type="checkbox"/> Hybrid
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3. Certification

The participant has reviewed the [Applicable Transfer Rehire Rules](#) that apply to this transfer and understands the impact, if any, on any benefits to which they may be entitled, and affirms that they consents to the transfer.

Signature of participant*	Date (mm/dd/yyyy)*
Signature of authorized employer official*	Date (mm/dd/yyyy)*

* Required field

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Transfers across different plan types

Where the DC plan into which the participant is transferred offers a range for employee contribution rates, the Employers' established default contribution rate will apply (the employee may not make a contribution election upon transfer into the new plan)

Where transfer is out of a DB (or DB component of Hybrid) plan, participant understands that their accrued pension earned under the previous plan will be frozen.

Where transfer is out of a DC (or DC component of Hybrid) plan, the DC account remains inactive while existing assets remain invested as directed by the participant. New contributions except for those rolled over from another qualified plan are not allowed.

Service time accrued under both plans will be used for meeting vesting and eligibility requirements only (and early retirement benefits, if applicable). Entitlement to benefits (in the form of a monthly payout or distribution) requires termination of employment, an application, and that all requirements of eligibility be met. Contributions, if applicable, will commence into the new plan with the payroll following participant's transfer date.

Transfers across same plan types

Where transfer occurs between DB plans, the participant understands that their accrued service earned under the previous DB or Hybrid plan (DB Component) will be transferred to the new division and the estimated benefit will be recalculated using the benefit program under the current plan, including but not limited to the multiplier, FAC period and definition of compensation. The participant understands that the benefit provisions of the division from which they terminate employment and apply for retirement govern their retirement benefit regardless of benefit provisions from prior divisions.


Where transfer occurs between DC plans, vested and non-vested balances transfer into the new division; the contributions into the new plan begin the payroll following participant's transfer date.

Where the new plan offers a range for employee contribution rates, the Employers' established default contribution rate will apply (the employee may not make an election upon transfer into the new plan).

For details, please review the ***Participant Transfer Rehire Rules*** at:

<https://assets.mersofmich.com/forms/ParticipantTransferRehireRules.pdf>



Review plan provisions in your new division by logging into your myMERS account online or contact the MERS Service Center  at 800.767.6377.