

**STANDARD TRANSFER MEMBER CERTIFICATION  
FOR SAME EMPLOYER**



EMPLOYEE NAME: \_\_\_\_\_  
 SOCIAL SECURITY NUMBER: \_\_\_\_\_ (last 4 digits only)  
 EMPLOYER NAME / #: \_\_\_\_\_  
 EFFECTIVE DATE OF TRANSFER: \_\_\_\_\_ **1<sup>st</sup>, 20** \_\_\_\_\_

PREVIOUS DIVISION	CURRENT DIVISION
	*Under the standard transfer rules, you must be placed in the open active plan for the division.
<b>NAME:</b> _____	_____
<b>PLAN TYPE:</b> <input type="checkbox"/> Defined Benefit (DB)	<input type="checkbox"/> Defined Benefit (DB)
<input type="checkbox"/> Defined Contribution (DC)	<input type="checkbox"/> Defined Contribution (DC)
<input type="checkbox"/> Hybrid (DB + DC Components)	<input type="checkbox"/> Hybrid (DB + DC Components)

**Transferring When Previous and Current Plan Types are Different**

With my transfer from the employer above, I understand and agree that my accrued pension earned under the previous plan will be frozen<sup>1</sup>. Vested employee balances in a previous DC plan shall be considered not frozen but open for additional contributions where the current plan is the DC plan or the Hybrid plan (DC Component). The effective date into the current plan will be the date of my transfer. My future pension accruals under the current plan will be earned from the date of my participation. Service from both the frozen accrued benefit and the current benefit plan will be used as eligibility only for purposes of vesting and early retirement options. The accrued frozen benefit and current benefit will be payable at the time of retirement from employment assuming I qualify at that time to receive a pension.

**Transferring When Previous and Current Plan Types are the Same**

With my transfer from the employer above, I understand and agree that my accrued pension earned under the previous Defined Benefit plan or Hybrid plan (DB Component) will be recalculated using the benefit program under the current DB plan. Vested employee balances in the previous Defined Contribution plan or Hybrid plan (DC Component) shall be considered not frozen but open for additional contributions where the current plan continues to be the DC plan or Hybrid (DC Component).

I have received a copy of the [Standard MERS Participant Transfer Rules](#) for my records and have read and understood this Member Certification Form.

\_\_\_\_\_  
Signature of Member

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

<sup>1</sup> Frozen accrued pension is calculated with benefit plan provisions, FAC, and service as of termination of prior employment or date of transfer.