

Restricted Prior Service Credit Application

For New Members Employed after January 1, 2017 - Read the Instructions Provided Before Completing Application

MEMBER INFORMATION

Please type or use only black ink and do not highlight; any corrections must be initialed.

Name: Department:
Address: City: State: Zip:
Phone Number: Email: Employee ID#:

1. MEMBER CERTIFICATION

I hereby apply for Restricted Prior Service Credit with the Employees' Retirement Fund of the City of Dallas (ERF) and certify that I was previously employed as a **full-time permanent**, paid employee for an authorized public agency. I further certify that I understand that the Restricted Prior Service Credit is only used to determine eligibility to vest and retire, not toward calculating benefits and that I am submitting this application no later than three years after my start date. Service described below is not currently included as ERF service credit that could result in future benefit payments.

(Please read the instructions provided with this application for types of eligible credit.)

Note: If applying for Restricted Prior Service Credit with more than one public agency or authority created by an employer that is in the United States; a state, county, municipality in or territory of the United States, a separate form must be completed for each employer.

From (MM/DD/YY)	To (MM/DD/YY)	Government Entity	Total Years, Months
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Member's Signature

Date Signed

2. FORMER EMPLOYER VERIFICATION OF SERVICE

I hereby verify that to the best of my knowledge, and after appropriate investigation, the above is a correct statement of full-time paid service performed by the applicant for this entity. I also hereby verify that the entity for which the employee previously worked is a public agency or authority created by the United States government or a state, county, municipality in or territory of the United States.

Entity Name

Official Signature

Date Signed (MM/DD/YYYY)

Printed Name & Title

E-mail

3. ERF CERTIFICATION

I hereby certify that I have examined the application of the above named member for Restricted Prior Service Credit, along with the verification of service certified and hereby endorse this application as approved.

ERF Executive's Printed Name and Title

Signature of ERF Executive

Date Signed (MM/DD/YYYY)

Restricted Prior Service Credit Application Instructions

APPLICATION FOR RESTRICTED PRIOR SERVICE CREDIT INSTRUCTIONS

This credit can be granted for service performed:

As a **full-time permanent**, paid employee of:

- The United States federal government;
- Any public authority or agency created by the United States;
- Any state or territory of the United States;
- Any political subdivision of any state in the United States;
- Any public agency or authority created by a state or territory in the United States; or
- Any public institution of higher education.

Note: Prior full-time paid employment as a civilian with the City of Dallas may be eligible for Restricted Prior Service Credit if the pension benefits related to that service were lost due to forfeiture or withdrawal and not reinstated.

HOW TO COMPLETE THIS FORM

The *Member Certification* sections should be completed by the member. List all periods of service. If service was not continuous, each period should be listed separately. Employees may receive one day of Restricted Prior Service Credit for each day of service to the entity.

The *Former Employer Verification of Service* section should be completed by the former employer. The official custodian of personnel records of the former employer should verify the service performed by the applicant. An appropriate official of the agency shall endorse the claim as accurate, email a completed copy to retirement_fund@dallaserf.org, provide the member with a copy and mail the original application to ERF at 1920 McKinney Avenue, 10th Floor, Dallas, TX 75201.

The ERF Certification section shall be completed by ERF. Once the member's prior service has been certified by ERF, a Declaration Letter will be sent to the member to include the Restricted Prior Service days approved.

Note: This section should not be completed if the member is applying for previously forfeited ERF Restricted Prior Service Credit. ERF can verify this service.

SERVICE NOT ACCEPTED

The following service is not eligible for Restricted Prior Service Credit:

- Any military time that was not full-time active duty;
- Private corporations or companies;
- Part-time employment;
- Volunteer work; or
- Temporary or seasonal work.

KEY ADDITIONAL INFORMATION

- If a member is applying for credit with more than one entity, an application must be completed for each entity.
- This prior service credit is "restricted" to time credit only for vesting and retirement eligibility purposes and has no monetary value.
- Upon receipt of the application, ERF will verify that the service has not been previously granted, and will update the member's account.
- The member applying for Restricted Prior Service Credit must have become a member on or after January 1, 2017.
- To be eligible, you must apply for restricted prior service credit no later than three years after your start date with the City of Dallas.