

# Application for Restricted Prior Service Credit



## MEMBER INFORMATION

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

|                                     |       |     |   |
|-------------------------------------|-------|-----|---|
| Member's Name (first, middle, last) |       |     | Social Security Number                    |
| Mailing Address                     |       |     | Daytime Phone Number                      |
| City                                | State | Zip | TMRS Identification Number (not required) |

### 1. MEMBER CERTIFICATION

I hereby apply for Restricted Prior Service Credit with the Texas Municipal Retirement System and certify that I was previously employed as a full-time, paid employee by \_\_\_\_\_ (name of former employer) or have refunded (forfeited) service under \_\_\_\_\_ (name of Texas statewide retirement system). I further certify that the service described below is not currently included as service credit in TMRS. (Please read the instructions provided with this form for types of eligible credit.)

**Note:** If applying for credit with **more than one** employer or retirement system, a separate form must be completed for each employer or retirement system.

| From (MM/YYYY) | To (MM/YYYY) | Department/Position | Total Months |
|----------------|--------------|---------------------|--------------|
|                |              |                     |              |
|                |              |                     |              |

|                    |                          |
|--------------------|--------------------------|
| Member's Signature | Date Signed (MM/DD/YYYY) |
|--------------------|--------------------------|

### 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 service performed by the applicant for this entity, or correctly represents forfeited service performed under this statewide retirement system. I also hereby verify that the entity for which the employee previously worked is an agency or authority in one of the categories set forth in the instructions provided with this form.

|                        |                          |
|------------------------|--------------------------|
| Name of Entity         | Employer Phone Number    |
| Official Signature     | Date Signed (MM/DD/YYYY) |
| Printed Name and Title | E-mail Address           |

### 3. CITY CERTIFICATION (to be completed by current employer, or by last employing city)

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 by the former employer and hereby endorse this application as approved.

|                            |                          |
|----------------------------|--------------------------|
| City Name                  | City Phone Number        |
| Signature of City Official | Date Signed (MM/DD/YYYY) |
| Printed Name and Title     |                          |

Please read the instructions provided with this form.



## Application for Restricted Prior Service Credit Instructions

### This credit can be granted for service performed:

- As a full-time, 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
  - An institution of higher education at which the person is commissioned as a campus security personnel employee under Section 51.212 of the Education Code.

*Note: The member may not have received TMRS service credit for this public service, including combined service credit under the Proportionate Retirement Program.*

- As an employee of the State of Texas or any branch, agency, or subdivision of the state for which the person received service credit under:
  - The Employees Retirement System of Texas;
  - The Teacher Retirement System of Texas;
  - The Judicial Retirement System of Texas (Plan I or Plan II);
  - The Texas County and District Retirement System;
  - The Texas Municipal Retirement System; or
  - The City of Austin Employees Retirement System.

*Note: The member may obtain this credit only if the credit has been forfeited because of withdrawal of contributions and the credit has not been reinstated.*

### HOW TO COMPLETE THIS FORM

The “Member Information” and “Member Certification” sections should be completed by the member. All periods of service should be listed. If service was not continuous, each period should be listed separately. Employees may receive one month of Restricted Prior Service Credit for each month 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. Upon verification, the official should return this form to the member for further processing. This section should not be completed if the member:

- Is applying for active duty military service (a copy of the member’s DD214 discharge document will be required); or
- Is applying for previously forfeited TMRS credit. TMRS can verify this service.

The “City Certification” section should be completed by the member’s last employing municipality. After the other sections have been completed, and the city is satisfied that the claim is correct, the custodian of city personnel records shall endorse this claim as approved and mail the original application to TMRS at P.O. Box 149153, Austin, TX 78714-9153.

### IMPORTANT

- 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.
- The city must have authorized Restricted Prior Service Credit by ordinance.
- Upon receipt of the application, TMRS will verify that the service has not been previously granted, and will update the member’s account.
- The member applying for the credit must have been an employee on or after the date the city adopted Restricted Prior Service Credit.

### SERVICE NOT ACCEPTED

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

- National Guard or any military time that was not active duty;
- Private corporations or companies;
- Part time employment;
- Various elected officials;
- Volunteer work;
- Temporary or seasonal work; or
- Current service credit in TMRS or another Proportionate Retirement Program system.