



INSTRUCTIONS

PLEASE READ CAREFULLY

You may submit this form if you are a Tier I or II member and you are requesting a Cost Letter to purchase credit for the types of service listed below.

Types of Service for Which You May Purchase Credit

Outside teaching service
(Tier I only)

Creditable teaching and/or pedagogical supervisory service rendered on a regular per annum basis in a school or college not maintained by the City of New York.

Amman service
(Tier II only)

Creditable service, such as regular substitute teaching or per diem service, that you rendered with a New York City or New York State public employer during a leave of absence from your TRS-eligible position or after separating from service.

(Members who opted into the Age 55 Retirement Program must pay 1.85% of the gross salary they earned for Amman service rendered from February 27, 2008 until they reach 25 years of Total Service Credit or until June 29, 2008, whichever is later.)

Leave of absence without pay
(military and/or non-military)

A period that may be creditable under limited circumstances.

(Do not file this form to purchase credit for military service rendered during specified periods of military conflicts (i.e., Article 20 of the New York State Retirement and Social Security Law). Instead, please file a "Military Service Credit Request Form" (code SD68).)

Benefits of Purchasing Service Credit

- Your prospective service retirement allowance may be higher.
- If you are not vested, you may more quickly attain vested rights and qualify for retirement benefits.

Crediting of Service

- Credit for outside teaching service must be requested within four years of attaining Tier I status. Outside teaching service would be credited after the service is verified by TRS and upon payment.
- Amman service would be credited after the service is verified by TRS, upon payment, and upon return to active service in a TRS-eligible position.
- Credit for a leave of absence without pay may be granted after certain requirements are fulfilled, depending on the type of your leave. In general, your employer must first recommend that credit be granted for the leave (not required for a military leave of absence). A leave of absence without pay would be credited after the leave is verified by TRS and upon full payment. (Please note that credit for certain non-military leaves of absence without pay may not require purchase by Tiers I/II members.)

Documentation of Service

- **Outside teaching service (Tier I only):** Upon receipt of this form, along with the complete name and address of the employer for whom you rendered the service and your employment period (i.e., start date and end date), TRS will send your former employer an "Outside Service Verification Form" (code SD6b) to complete and return to us. This form will provide TRS with the documentation necessary to evaluate your eligibility for this service credit.

- **Amman service (Tier II only):** Upon receipt of this form, TRS will contact your former employer(s) to verify your service. If you submit documentation to support your claim for service credit, your documentation must meet all of the following criteria:
 - ✓ The documentation must be on official letterhead from the employer for whom you rendered the service; **and**
 - ✓ The documentation must contain the exact time period(s) of service (*e.g.*, total hours or days worked) with a year-by-year breakdown; **and**
 - ✓ The documentation must show the status of your employment during the service rendered (*e.g.*, full-time or part-time); **and**
 - ✓ The documentation must detail your salary history and title(s) during the service rendered (*e.g.*, showing the effective date of any annual salary, hourly rate, or title changes).

Note: In certain cases, TRS may need to request additional documentation to determine whether your service is creditable.
- **Leave of absence without pay (military service):** You must submit the following official documentation to verify your leave:
 - ✓ A leave notice issued by your employer that clearly states the purpose for which the leave was granted and the period covered by the leave; **and**
 - ✓ A notice of your separation from military service (*i.e.*, the DD-214 military discharge form).
- **Leave of absence without pay (non-military):** You must submit the following documentation to verify your leave:
 - ✓ A leave notice issued by your employer that clearly states the purpose for which the leave was granted, the period covered by the leave, and a recommendation that credit be approved.

Note: Depending on the type of your leave of absence, other documentation may also be required.

General Provisions

- Do not file this form to claim credit for the following types of service: certain eligible military service that interrupted your employment prior to becoming a TRS member; prior service with a New York City public employer (Tier I only); and prior service with a New York City public and/or New York State public employer (Tier II only). Since Tiers I and II members do not need to purchase credit for the above types of service, you may instead submit a written request to TRS, along with documentation of your service; TRS will then verify your eligibility for the service credit requested.
- If you intend to retire within the next 12 months, please indicate your expected date of retirement in Part B of this form.
- Your Cost Letter will be based only on the amount of creditable service that has been verified by your employer(s) and/or official documentation.
- If you already submitted documentation and/or if TRS already verified your service, you would not need to resubmit any information at this time unless you are claiming additional unverified service.
- For a breakdown of your Total Service Credit, you may consult your latest Annual Benefits Statement (ABS) or submit a "Total Service Letter Request Form (For Tiers I/II Members Only)" (code SD154).

Questions and Further Information

- For your convenience, TRS forms and publications are available on our website. If you require additional assistance, please contact our Member Services Center at 1 (888) 8-NYC-TRS.



COST LETTER REQUEST FORM
FOR TIERS I/II MEMBERS



TEACHERS' RETIREMENT SYSTEM
OF THE CITY OF NEW YORK (TRS)
55 Water Street, New York, NY 10041
www.trsnyc.org • 1 (888) 8-NYC-TRS

Please read the instructions on pages 1 and 2 before completing this form.

(NOTE: Please print in black or blue ink, and initial any changes that you make on this form.)

PART A: Please provide the information below.

First Name	MI	Last Name	Social Security Number (last 4 digits only)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Permanent Home Address	Apt. No.		TRS Membership Number
<input type="text"/>	<input type="text"/>		<input type="text"/>
City	State	Zip Code	Primary Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
<input type="text"/>	<input type="text"/>	<input type="text"/>	(<input type="text"/> <input type="text"/> <input type="text"/>) <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
			Alternate Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
			(<input type="text"/> <input type="text"/> <input type="text"/>) <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please keep your personal information with TRS up to date. We will update our records based on the information you provide above.

PART B: To request a Cost Letter, please check the box below, indicate the type and period(s) of service for which you are requesting credit, and write your initials in the space provided. If you are requesting credit for a non-military leave of absence without pay, please indicate the type of leave by checking the appropriate box. If you intend to retire within the next 12 months, please also indicate your expected date of retirement. (All dates should be in MM/DD/YYYY format.)

___ ☐ I hereby request that TRS send me a Cost Letter to purchase credit for the type of service I have indicated below.

___ ☐ **Outside teaching service (Tier I only)**

Period: From / / To / /

Employer's name and address:

Period: From / / To / /

Employer's name and address:



☐ **Amman service (Tier II only)**
 Period: From / / To / /
 Period: From / / To / /

☐ **Leave of absence without pay (military service)**
 Period: From / / To / /
 Period: From / / To / /

☐ **Leave of absence without pay (non-military)**
☐ *Public employment (NYS or NYC position)*
 Period: From / / To / /
 Period: From / / To / /
☐ *Officer or staff member of collective bargaining unit*
 Period: From / / To / /
 Period: From / / To / /
☐ *Restoration of health (Tier I only)*
 Period: From / / To / /
 Period: From / / To / /
☐ *Study (Tier I only)*
 Period: From / / To / /
 Period: From / / To / /
☐ *Federal, NYS, or NYC public welfare service program (Tier I only)*
 Period: From / / To / /
 Period: From / / To / /

Expected date of retirement (if applicable): / /

PART C: Please read the following statement and sign and date this form below.

I hereby request that TRS send me a Cost Letter for the periods of service listed in Part B. I have read the instructions about "Documentation of Service" and am aware that I may need to submit documentation with this form in some cases. I certify that the information I have provided above is accurate to the best of my knowledge.

MEMBER'S SIGNATURE _____ DATE (MM/DD/YYYY) _____