KU HUMAN RESOURCES & EQUAL OPPORTUNITY
The University of Kansas

# KBOR UNCLASSIFIED RETIREMENT DATA

Faculty and unclassified professional staff of the University of Kansas are required to participate in a retirement plan after a one-year waiting period. Participation in one of the basic retirement plans is **mandatory** when an employee becomes eligible to participate. Participation is a condition of employment. The one-year waiting period will be *waived* if:

1. you were covered, as a result of employment with an institution of higher education located in the United States, by a retirement plan or program to which employer contributions were made for at least one year (365 days) within the five year period immediately preceding employment with KU, or
2. you served at least one year (365 days), including time in a waiting period, in a position covered by any other State of Kansas retirement plan (KPERS or mandatory deferred compensation) within the five year period immediately preceding employment with KU.

No employment as a (i) student, (ii) seasonal or temporary employee, or (iii) employee who works less than half-time per year shall count toward the satisfaction of the one-year waiting period requirement.

For the waiting period to be waived, the Retirement Verification form must be completed by the institution where the contributions were credited. If you are eligible for immediate participation, agents for the retirement program providers, who will establish a contract for your funds, are as follows:

| | |
|---|---|
| **ING (www.ingretirementplans.com/custom/KansasBOR)** | **1-800-814-1643** |
| **TIAA-CREF (www.tiaa-cref.org/kbor)** | **856-4800 (Lawrence number)** |

Applications for both ING and TIAA-CREF are available in the Benefits Office

If you are subject to the one-year waiting period, Benefits will send you information about the mandatory retirement companies six weeks prior to your eligibility, or sooner, if you request.

**List employment history beginning with your most recent non-student service in which you have had a retirement plan with employer contributions.**

Employer Your Position Employment Dates: From To

1. _____
2. _____
3. _____

Have you had employer contributions for at least one year (365 days) at an institution of higher education? ___Yes ___No
Were you a participant in the Kansas Board of Regents Mandatory Retirement Plan prior to 01/01/96? ___Yes ___No
Have you been a contributing member of KPERS over the past five years? ___Yes ___No
Are you a current KPERS retiree? ___Yes ___No

If transferring from a State of Kansas agency, do you have any of the following deductions?

| | | | |
|---|---|---|---|
| Optional Group Life | ___Yes ___No | Savings Bonds | ___Yes ___No |
| Health Care Flex Spending Acct | ___Yes ___No | Dependent Care Flex Spending Acct | ___Yes ___No |
| Organizational Dues | ___Yes ___No | Long Term Care | ___Yes ___No |
| VTSA | ___Yes ___No | ING Deferred Comp | ___Yes ___No |

I hereby certify that I have read and understand the above, and all the information given herein is accurate and to the best of my knowledge.

_____ _____ _____
Signature Social Security Number Date

**Benefits Use Only**

Hire Date:_____ Code: _____ Eligibility Date: _____ 7/08

Copy to HR_____