

**Somerville Retirement Board
City Hall Annex
50 Evergreen Avenue
Somerville, MA 02145-2819**

(617) 625- 6600 Ext 4600

Fax: (617) 591-3211

retirement@somervillema.gov

*EDWARD F. BEAN, CHAIRMAN
JOHN M. MEMORY
ROBERT K. MASSIE*

*THOMAS ROSS, VICE CHAIRMAN
ALEX NOSNIK*

To: New Employee

From: Retirement Board

Date:

Re: Retirement Membership Application

Attached please find a blank copy of New Member Enrollment and Beneficiary Selection Forms for the Somerville Retirement Board. In accordance with Massachusetts G.L. Chapter 32, Section 18, you are required to complete these forms.

Please bring the completed forms to the Retirement Board office immediately at the address above along with a copy of your birth certificate. Please complete the Beneficiary Selection Form and have it witnessed by someone over the age of 18 who is not the beneficiary.

If you are a veteran, please also bring a copy of your DD 214.

We look forward to meeting you.

Introduction

New Member Enrollment Form

Form Last Revised: October, 2001

The *New Member Enrollment Form* allows a newly hired employee to apply for membership in a public retirement system. The form must be completed by any eligible new employee regardless of his or her past employment with any governmental entity. Certain information on this form must be provided by the Payroll/Personnel Department and verified by the Retirement Board. A member's beneficiary to receive a refund of the member's total accumulated deductions is now selected on the *Beneficiary Selection Form*.



New Member Enrollment Form

Form Last Revised: October, 2001

Retirement Board: Please place your address and phone number here. ▶	Somerville Retirement Board City Hall Annex 50 Evergreen Avenue Somerville, MA 02145-25819 (617) 625-6600 X 4600
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Employee Name

Last
 First
 M.I.
 Social Security #
 Sex

Address

Street and Number
 City/Town
 State
 Zip
 Phone #

Birth Name or Former Name (if different)
 Date of Birth*
 M S W D
 Marital Status

Spouse's Name
 Spouse's Date of Birth
 # of Children

Agency or Department**
 Title/Position
 Starting Date of Present Service

* The retirement board may request a copy of birth records, military discharge papers and other pertinent data.

** For those retiring from regional or county retirement system, please identify the community.

Are you retired from any other Massachusetts public retirement system?
 Yes No

Were you ever a member of any other Massachusetts public retirement system?
 Yes No

List prior or current public retirement system membership:

SYSTEM	DATES OF MEMBERSHIP	ARE YOUR FUNDS STILL ON DEPOSIT?
<input type="text"/>	<input type="text"/> to <input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/> to <input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/> to <input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you wish to purchase past creditable service, you must make that request in writing of the relevant retirement system and produce acceptable proof of such service.

Did you ever work for or do you currently work for the Commonwealth or one of its political subdivisions for which you were not/are not a contributing member of a retirement system?
 Yes No



<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Member's Last Name	First	M.I.	Social Security #

List prior or current employment with the Commonwealth or one of its political subdivisions (Non-membership) :

EMPLOYER	DATES OF EMPLOYMENT
<input type="text"/>	<input type="text"/> to <input type="text"/>
<input type="text"/>	<input type="text"/> to <input type="text"/>
<input type="text"/>	<input type="text"/> to <input type="text"/>
Are you a Veteran?* <input type="checkbox"/> Yes <input type="checkbox"/> No	Dates of Active Duty Service <input type="text"/> to <input type="text"/>

* The retirement board may request a copy of birth records, military discharge papers and other pertinent data.

I hereby authorize the Treasurer to withhold the proper percent of my regular compensation due on each pay period and to deposit such deductions to my credit in the annuity savings fund. I understand the full amount of such deductions, with regular interest as provided by law, will be returned to me upon my written request if I terminate my service, unless I plan to accept a position which would entitle me to become a member of any other contributory retirement system in the Commonwealth. In the event that I die before retiring, my beneficiary or beneficiaries may receive survivor benefits or a refund of my accumulated total deductions as allowed by law.

I sign this form under the pains and penalties of perjury. I affirm that the information presented in this form is correct, complete and accurately presented. I understand that giving false or incomplete information may subject me to the loss of my benefits as well as civil and criminal penalties.

X Employee's Signature _____ Date: _____

To Be Completed by Payroll/Personnel Department and Verified by Retirement Board:

Check base rate to be deducted for retirement:

5% 7% 8% 9% Additional 2%

If 5% or 7% or 8%, state reason:

Current Rate of Regular Compensation per Pay Period:

Employment Status (Check all that apply):

Permanent Temporary Full-time Part-time: 50% 75% Other _____

Authorized Signature: _____ Date: _____

Print Name

To Be Completed by the Retirement Board:

Membership Date \$ Annual Regular Compensation % to be deducted
 Group Classification

The member must also complete the Beneficiary Selection Form.

Introduction

Beneficiary Selection Form (If Member Dies Before Retirement)

Form Last Revised: October, 2001

The *Beneficiary Selection Form* allows a member to select an eligible beneficiary to receive an allowance if the member dies before retirement and to select a beneficiary(ies) to receive payment of accumulated deductions and other payments due to a member if the member dies before retirement. Keep in mind:

- Only certain of your relatives qualify as an eligible beneficiary for benefits under G.L. c. 32, § 12(2)(d), but any person or entity can be selected as a beneficiary(ies) for a return of your accumulated total deductions.
- Your selection on this form may be superseded by an eligible spouse under the provisions of G.L. c. 32, § 12(2)(d) if you die before retirement.
- This form becomes void upon your retirement.
- If you divorce or your personal situation changes, you may wish to file a new form with your retirement board.



Beneficiary Selection Form (If Member Dies Before Retirement)

Form Last Revised: October, 2001

Retirement Board. Please place your address and phone number here.	SOMERVILLE RETIREMENT SYSTEM CITY HALL ANNEX 50 EVERGREEN AVENUE SOMERVILLE, MA 02145 617-625-6600 4600
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Choice of Beneficiary to Receive a Return of Accumulated Total Deductions at Member's Death

I, (Print Name) , a member of the Retirement System hereby request the Board of Retirement to pay any sum referred to in G.L. c. 32, § 11(2)* due at my death to the following beneficiary or beneficiaries in the proportions designated.

My selection may be superseded by a selection under G.L. c. 32, § 12(2)(d) if I die leaving an eligible spouse who elects to receive a monthly benefit.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement, this form becomes void.

*The types of payments covered under G.L. c. 32, § 11(2) include:

- The payment of the accumulated deductions credited to a member's account in the annuity savings fund at the date of death when the member's death occurs prior to his/her retirement.
- The amount of any uncashed checks payable to a member at his or her death.
- Any person or entity may be a beneficiary under G.L. c. 32, § 11(2). Give complete name and address of each beneficiary below:

			Proportion To Be Paid
Name	<input type="text"/> SSN <input type="text"/>	<input type="text"/>	<u>0/0/8</u> / Relationship
Address	<input type="text"/>		
Name	<input type="text"/> SSN <input type="text"/>	<input type="text"/>	
Address	<input type="text"/>		
Name	<input type="text"/> SSN <input type="text"/>	<input type="text"/>	
Address	<input type="text"/>		
Name	<input type="text"/> SSN <input type="text"/>	<input type="text"/>	
Address	<input type="text"/>		

Member's Signature _____ Date _____

Member's Address



<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
Member's Last Name	First	M.I.	Social Security #

To Be Completed by Witness of Choice of Beneficiary of Accumulated Total Deductions.

Signature of Witness _____ Date _____

Name of Witness (Print) _____

Choice of Option (D) Beneficiary

I, (Print Name) , a member of the Retirement System, hereby nominate the beneficiary * listed below, under the provisions of G.L. c. 32, § 12(2)(d) to receive from the retirement system a benefit equal to the Option (C) retirement allowance which would otherwise have been payable to me in the event that I die before being retired.

I understand that I may change my beneficiary designation at any time prior to my retirement and that upon my retirement this form becomes void.

I understand that this choice of Option D Beneficiary can be superceded if, at my death, I leave a spouse to whom I have been married for over one year and with whom I am living on the date of my death, or if living apart, for justifiable cause as determined by the Retirement Board.

Beneficiary

<input type="text"/>	<input type="text"/>
Name of Eligible Beneficiary	Beneficiary's Relationship to Member
<input type="text"/>	<input type="text"/>
Beneficiary's Date of Birth (Attach birth record)	Beneficiary's Social Security #

Member

Member's Signature _____ Date _____

<input type="text"/>	<input type="text"/>
Member's Street Address	Member's Social Security #
<input type="text"/>	<input type="text"/>
City/Town	State Zip

To Be Completed by Witness of Choice of Option D Beneficiary

Witness' Signature _____ Date _____

Witness' Name (Print)

* An eligible beneficiary is defined under G.L. c. 32, § 12(2)(d) as the spouse, former spouse who has not remarried, child, father, mother, sister or brother of the member.

CLEAR

Active Member Beneficiary Selection Form – Helpful Information

The purpose of the Beneficiary Selection Form is to allow members to select an eligible beneficiary to receive an allowance or to select one or more beneficiaries to receive payment of accumulated deductions and other payments due to a member in the event the member dies before retirement.

There are two types of benefits that can be paid to your beneficiary/beneficiaries:

1. Lump sum return of total accumulated deductions under the provisions of M.G.L. c. 32, § 11(2)

- a. There are no restrictions on who may be named as your lump-sum beneficiary or beneficiaries. You also may name more than one person or entity (for example: a trust or an estate). If you name more than one beneficiary or entity, please specify the percentage you would like given to each named person/entity and that the percentage total equals 100%. If no percentage is indicated, the lump sum return of accumulated deductions will be disbursed evenly to the named beneficiaries.
- b. Types of payments covered under the § 11(2) benefit include:
 - i. Payment of the accumulated deductions credited to a member's account in the annuity savings fund at the date of death when the member's death occurs prior to his/her retirement.
 - ii. Amount of any un-cashed checks payable to a member at his or her death
- c. *Please provide the relationship and date of birth for each named beneficiary/beneficiaries.*

2. Monthly payment of a pension benefit 12(2)(d), referred to as “Option D survivor benefit”

- a. Only certain persons qualify as an eligible beneficiary for benefits under the provisions of G.L. c. 32, § 12(2)(d), but any person or entity can be selected as a beneficiary(ies) for a lump sum 11(2) return of your accumulated total deductions.
 - i. **A qualifying relative refers to: Parent, Sibling, Spouse, Former Spouse who has not remarried, or a child, pursuant to M.G.L. c. 32 §12(2)(d).**
 - ii. **The Option D benefit is equal to the Option (C) retirement allowance which would otherwise have been payable to the member in the event that the member dies before being retired.**

Please note the following:

- Your selection on this form may be superseded by an eligible spouse under the provision of G.L. c. 32, § 12(2)(d) if you die before retirement, even if your spouse is not designated anywhere on the beneficiary form.
- You may choose to have: a lump sum beneficiary/beneficiaries, an “Option D” beneficiary, or both:
 - If both sections are completed, the provisions of G.L. c. 32, § 12(2)(d) “**Option D**” will supersede the provisions of G.L. c. 32, § 11(2).
 - A person cannot be named as both your §11(2), lump sum beneficiary, and §12(2)(d) beneficiary, Option D/Survivor beneficiary.
- The beneficiary form becomes void upon your retirement.
- The right to change any beneficiary anytime is reserved. If you divorce or your personal situation changes, you should file a new beneficiary form with the Somerville Retirement Office.
- If you wish to name a beneficiary under the age of 18, please provide a guardian/custodian for this beneficiary.
- **Forms with corrections or erasures will not be accepted. Forms without required signatures will not be accepted.**
- **Persons designated as a beneficiary cannot be a witness to your signature.**