



Retirement Plan Credit of Service Request

Instructions to the Employee

Use this form if you wish to have prior service at a teaching institution, an institution of higher learning or another study abroad organization considered toward your eligible service for the Council on International Educational Exchange's (CIEE) 403(b) Plan Employer Discretionary Contributions. You may be eligible for credit based on Years of Eligibility Service performed with one of these qualified employers.

Your previous employer must complete and send the following Credit of Service Request form to the CIEE Benefits Office at HRBenefits@ciee.org with a subject line of: "403b CIEE Contribution Service Credit".

Eligibility for Service Credit

A year of Eligible Service is defined as a 12-month period, measured from your date of hire or anniversaries of that date, in which you worked at least 1,000 hours.

Each full year of Eligible Service with a previous employer will be applied towards CIEE's Eligible Service calculation. This calculation is utilized to determine CIEE Discretionary Employer Contribution eligibility.

You will receive credit toward the CIEE Retirement Plan's Eligible Service calculation if 1) your previous employer is a qualified employer as described above and 2) you were eligible to participate in their retirement benefit plan.

CIEE Discretionary Employer Contribution Criteria*

For service greater than 2 years but less than 3 years, CIEE may make a discretionary contribution of 2.5% of your compensation. For service greater than 3 years, CIEE may make a discretionary contribution of 5% of your compensation.

You are not required to make pre-tax savings contributions to be eligible for a share of the employer's discretionary contribution.

If your service credit is approved, any CIEE employer contributions for which you are eligible will be effective with the first payroll following CIEE's receipt of acceptable information from your previous employer. Contributions cannot be retroactively effective.

*CIEE is under no obligation to maintain its current retirement plan design. Discretionary match provisions are not obligatory and are subject to change at any time



INSTRUCTIONS

Submit this completed CREDIT OF SERVICE REQUEST FORM to Employee Benefits

Email: HRBenefits@ciee.org

SECTION 1: EMPLOYEE INFORMATION

Name:		Employee ID or Social Security Number:	
Home Address:			
Date of Birth:	Home Phone:	Work Phone:	
CIEE Date of Hire:	Email:		

I request and authorize my previous employer to release my employment information to CIEE.

CIEE Employee Signature: _____ Date: _____

SECTION 2: PRIOR EMPLOYER INFORMATION

Bottom portion to be completed by the authorized representative of your previous employer:

- Are you a teaching institution, an institution of higher education or study abroad organization?
Yes _____ No _____
- Did the employee work in a retirement benefit eligible position for at least 12 consecutive months **and** 1,000 hours? Yes _____ No _____ Dates of employment: _____ to _____

SECTION 3: Prior Employer Certification

I certify the above information is correct.

Name of person completing this form: _____

Title: _____ Phone: _____

Name of Employer: _____

Signature: _____ Date: _____

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Approved Years of Eligible Service Credit Awarded _____ *Denied*

ERC Effective Date: _____ Reason: _____

Reviewed By: _____

Scan and email to HRBenefits@ciee.org

Questions? Please call Employee Benefits at 207-553-4266

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