



Missouri State Employees' Retirement System
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APP

Retirement Application General Employees, Legislators, and Elected Officials

Please print. • See reverse side for instructions.

SECTION A - PERSONAL INFORMATION

By filling out MOSERS *Retirement Application* you are completing Step 1 of the two-step retirement process. The retirement date given below will be the first day of the month you will begin receiving retirement benefits. Payments are made the last working day of each month.

Retirement Date ____/01/____ **Employee Classification** General State Employee Elected State Official Legislator

Social Security Number or Member ID _____ **Date of Birth** _____

Name (last/first/middle) _____

Mailing Address (PO or street/city/state/zip) _____

Work Phone Number _____ **Primary Phone Number** (home/cell) _____

Email Address _____

SECTION B - MARITAL STATUS

I Am Not Married (skip to Section C) **I Am Married to the Person Listed Below** (attach copy of marriage certificate)

Spouse's Name (last/first/middle) _____ **Spouse's Date of Birth** _____

Date of Marriage _____ **Spouse's Social Security #** _____

SECTION C - PROOF-OF-AGE AND LAWFUL PRESENCE

To establish your eligibility for retirement, you must **submit one** proof-of-age and lawful presence document for **yourself**, and one for your **spouse** (if applicable) with this retirement application. **DO NOT SEND ORIGINALS UNLESS SENDING A BIRTH CERTIFICATE.**

Member (please check one) _____ **Spouse** (please check one) _____

Birth Certificate
 (certified with embossed/raised seal issued by state or local government)

OR PHOTOCOPY OF ONE OF THE FOLLOWING

Valid Missouri Driver's License or Nondriver ID

U.S. Passport (current or expired)

U.S. Certificate of Citizenship, Naturalization, or Birth Abroad

Birth Certificate
 (certified with embossed/raised seal issued by state or local government)

OR PHOTOCOPY OF ONE OF THE FOLLOWING

Valid Missouri Driver's License or Nondriver ID

U.S. Passport (current or expired)

U.S. Certificate of Citizenship, Naturalization, or Birth Abroad

SECTION D - FORFEITURE OF RETIREMENT BENEFITS

General State Employees: Have you been charged or found guilty of a felony (as described on the next page)?

Yes No (See next page for additional details.)

Members of the General Assembly and Statewide Elected Officials: Have you been charged, found guilty, or convicted of a felony (as described on the next page), or removed from office by impeachment or for misconduct?

Yes No (See next page for additional details.)

If yes, you must provide documentation showing details of the above. MOSERS will determine your pension eligibility upon receipt of necessary documentation.

SECTION E - APPLICANT SIGNATURE

TO THE BOARD OF TRUSTEES OF THE MISSOURI STATE EMPLOYEES' RETIREMENT SYSTEM:

As an employee or former employee of the state of Missouri, I hereby apply to receive retirement benefits from the Missouri State Employees' Retirement System (MOSERS). If I should die before my date of retirement, I understand this application and any subsequent elections will be null and void. I understand that if I return to work in a benefit-eligible position covered by MOSERS or the MoDOT and Patrol Employees' Retirement System (MPERS), my retirement benefit will be stopped. Upon my death, I authorize MOSERS to obtain a copy of my death certificate. I hereby certify that all information on this application is true and correct.

Signature _____ **Date** _____

Instructions for Completing

Retirement Application

General Employees, Legislators, and Elected Officials

The retirement process is divided into two steps. This allows MOSERS to provide you with pertinent information needed to make informed decisions regarding your retirement benefit payment. The *Retirement Application* is required by MOSERS and completes **Step 1** of the retirement process. The application must be signed, dated, and received by MOSERS according to the due date coinciding with your date of retirement (see chart below). Steps for completing the application are outlined below.

Step 1

1. Complete Section A.
 - The date of retirement will always be the first day of the month.
2. Complete Section B regarding your marital status at the time of retirement.
 - If not married, check appropriate box and skip to Section C.
3. Section C outlines appropriate proof-of-age and lawful presence documents.
 - You must submit a proof-of-age and lawful presence document with your retirement application.
 - If married, you must submit a proof-of-age document for your spouse and a marriage certificate.
 - **Do not send originals unless sending a birth certificate with a raised/embossed seal.**
4. As it pertains to your employee classification, you are required to answer the question in Section D regarding felony conduct or removal from office.

Forfeiture of Retirement Benefits - General State Employees: You (and your beneficiary) will forfeit all rights to retirement benefits accrued on or after August 28, 2014 if you have been found guilty on or after August 28, 2014 of a felony under state law (or a substantially similar offense provided under federal law) involving stealing or receiving stolen money, property, or service valued at \$5000 or more, forgery, counterfeiting, bribery of a public servant, or acceding to corruption, in connection with your duties as a state employee. However, if you are such a member of the MSEP 2011, you may still request from MOSERS a refund of your contributions including interest credited to your account.

Forfeiture of Retirement Benefits - Members of the General Assembly and Statewide Elected Officials: You (and your beneficiary) will forfeit all rights to retirement benefits accrued on or after August 28, 1999 if you have been convicted of a felony on or after August 28, 1999; or to retirement benefits accrued on or after August 28, 2014 if you have been found guilty on or after August 28, 2014 of a felony under state law (or a substantially similar offense provided under federal law) involving stealing or receiving stolen money, property, or service valued at \$5000 or more, forgery, counterfeiting, bribery of a public servant, or acceding to corruption, in connection with your duties as a member of the general assembly or a statewide elected official. You (and your beneficiary) will also forfeit all rights to retirement benefits if you have been convicted of any felony which occurred while in office or removed from office by impeachment or for misconduct. However, if you are such a member of the MSEP 2011, you may still request from MOSERS a refund of your contributions including interest credited to your account.

5. Applicant is required to sign and date Section E.
6. Return completed form to MOSERS with acceptable proof-of-age and lawful presence documents to complete **Step 2** of the retirement process. If you do not submit your application or election form on time, your benefit payment/retirement date may be delayed.

If you submit an application and then decide not to retire, please send MOSERS a written notice to rescind your application.

Your application will become null and void if you do not complete the two-step process within 90 days of your stated date of retirement.

Step 2

MOSERS will use the information from this application to prepare a *Retirement Election Form* and benefit estimate to be mailed to your home address. On the *Retirement Election Form* you will choose a retirement plan (if eligible), the BackDROP (if applicable), and a benefit payment option (required). The election form must be received by MOSERS prior to your date of retirement.

If you retire and return to work in a benefit-eligible position covered by MOSERS or the MoDOT and Patrol Employees' Retirement System (MPERS), your retirement benefit will be stopped. For more information contact MOSERS.

Due Dates for MOSERS Retirement Forms

Date of Retirement*	Application Due	Election Form Due
	Step 1	Step 2
January 1	November 30	December 31
February 1	December 31	January 31
March 1	January 31	February 28
April 1	February 28	March 31
May 1	March 31	April 30
June 1	April 30	May 31
July 1	May 31	June 30
August 1	June 30	July 31
September 1	July 31	August 31
October 1	August 31	September 30
November 1	September 30	October 31
December 1	October 31	November 30

*The date of retirement will always be the first day of the month.