



Serving the People Who Serve Our Schools

# Welcome to SERS

Established by state law in 1937, SERS is one of five Ohio public pension funds and provides retirement, disability, survivor, and other benefits to its eligible members, retirees, and beneficiaries. The retirement plan SERS offers is a **defined benefit (DB)** plan. Under a DB plan, the amount of a person's retirement allowance is a fixed lifetime benefit.

**Working Together to Build Your Secure Retirement** SERS funds the benefits it provides from three sources: member contributions (you make your member contributions through your employer), employer contributions, and investment earnings. Earnings on SERS' investments are the major source of SERS' assets. The System provides retirement benefits to more than 63,000 retired members. You are joining more than 123,000 current, active members.

**Ensuring Funds Will Be Available When You Retire** SERS takes very seriously its mission to provide pensions, benefits, and services to our members, retirees, and beneficiaries that are soundly financed, prudently administered, and delivered with understanding and responsiveness.

## **SERS' Member Publications and Website Keep You Connected**

Soon you will receive your *Member Handbook* in the mail. It contains detailed information about your retirement plan and benefits. Also, please make sure to read the quarterly publications that SERS will mail to your home address. It is important that you keep your address current with SERS.

Please visit our website at [www.ohsers.org](http://www.ohsers.org) for comprehensive benefit information and the latest SERS news. You can use the website's Member Log-in feature to safely access your personal account and updated contribution balance.

## **SERS' Benefits Available to You**

**Your Member Contributions** You are **guaranteed** the return of your member contributions in the form of a retirement allowance, survivor benefit, or refund. Your right to receive a retirement allowance becomes guaranteed when your retirement application is approved. Instead of a retirement allowance, you may receive a refund of your member contributions if you stop working for your SERS employer. However, if you take a refund, you give up all of your SERS membership rights including the right to receive a retirement allowance, and tax penalties will apply unless you roll the money into a qualified account. For more information, see your *Member Handbook*.

**Your Retirement Benefits** Your retirement allowance is based on your age, number of years of service ("service credit"), and final average salary (FAS). For more information, see your *Member Handbook*.

A member who joins SERS before **May 14, 2008** will be eligible for a guaranteed lifetime monthly pension with the following combinations of age and service credit:

- 5 years of service credit at age 60; or
- 25 years of service credit at age 55; or
- 30 years of service credit at any age.

Those who become SERS members **on or after May 14, 2008** will be eligible for a guaranteed lifetime monthly pension with the following combinations:

- 10 years of service credit at age 62; or
- 25 years of service credit at age 60; or
- 30 years of service credit at age 55.

**Disability Benefits** If you become physically or mentally unable to perform the duties of your school job, and you have at least five years of service credit, you can apply for disability benefits. If approved, your benefit amount will range from 45% to 60% of your final average salary (FAS). For more information, see your *Member Handbook*.

**Survivor Benefits** Monthly survivor benefits are payable to qualified beneficiaries of a member who dies before retirement. Qualified beneficiaries who are receiving a monthly survivor benefit also have access to SERS health care plan.

Also, upon the death of a disability or service retiree, a \$1,000 lump sum death benefit is paid to the designated beneficiary. For more Survivor Benefit information, see your *Member Handbook*.

**Health Insurance** SERS has provided retirees with access to health insurance since 1974, and it is the goal of the retirement system to continue this access. Plan benefits, premiums, and continued access depend upon available resources and are subject to change.

**Members should be aware, however, that health insurance is not guaranteed. Unlike pensions, which are required by Ohio law, health insurance is provided at the discretion of SERS' Retirement Board and the available plans can change at any time.** For more information, see your *Member Handbook*.

SERS is your partner in helping you achieve a secure retirement. Our staff is here to help you, so please don't hesitate to contact us toll free at 1-866-280-7377 if you have any questions or would like to schedule a retirement counseling session.



# SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

300 EAST BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746 • (614) 222-5853  
Toll-Free 1-866-280-7377 • www.ohsers.org

## Membership Record

### PART A - TO BE COMPLETED BY MEMBER

\_\_\_\_-\_\_\_\_-\_\_\_\_

SOCIAL SECURITY NUMBER

LAST NAME FIRST MIDDLE MAIDEN

PERMANENT MAILING ADDRESS STREET CITY STATE ZIP  
MALE   
FEMALE

DATE OF BIRTH MONTH DAY YEAR E-MAIL ADDRESS  
SINGLE  DIVORCED   
MARRIED  WIDOWED

PHONE NUMBER ( )

### FAMILY DATA

SPOUSE LAST NAME FIRST MIDDLE OR MAIDEN DATE OF BIRTH MONTH/DAY/YEAR

CHILDREN

FATHER

MOTHER

### JOB CLASSIFICATION *Mark one box only:*

- Administrative
- Educational Aide
- Supplemental (Coach, Advlsor, Etc.)
- Clerical/Secretarial
- Food Service
- School Board Member
- Custodial/Maintenance
- Transportation
- Other \_\_\_\_\_

### MEMBERSHIP IN OTHER OHIO SYSTEM

For all of the following, check "yes" or "no" if you ever were a member of or received benefits from:

|   | MEMBER                       |                             | BENEFIT                      |                             |
|---|------------------------------|-----------------------------|------------------------------|-----------------------------|
| School Employees Retirement System of Ohio  | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| State Teachers Retirement System of Ohio    | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Ohio Public Employees Retirement System     | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Ohio Police and Fire Pension Fund           | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Ohio State Highway Patrol Retirement System | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Cincinnati Municipal Retirement System      | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

### MEMBER CERTIFICATION

I hereby certify the information given hereon to be true to the best of my knowledge.

SIGNATURE \_\_\_\_\_ DO NOT PRINT DATE \_\_\_\_\_

### PART B - TO BE COMPLETED BY EMPLOYER

\_\_\_\_ COUNTY DISTRICT NO.

SCHOOL DISTRICT COUNTY MEMBER'S FIRST DATE OF SERVICE THIS SCHOOL YEAR (July 1 - June 30)

I hereby certify that I have verified the employee's social security number, the job title, and the first date of service for the current employment.

TREASURER'S SIGNATURE \_\_\_\_\_