Transfer of Service & Associated Funds To ERS
From Maryland State, City or County Municipality Within Maryland

New Hybrid (Class D) Pension Members

Employees' Retirement System (ERS), 7 E. Redwood Street, 13th Floor, Baltimore, MD 21202
Phone: (443) 984-3200 / Email: contactERS@bcers.org / Website: www.bcers.org

ELIGIBILITY: New members enrolled in the Hybrid Class D pension plan may transfer accumulated or earned service credit and associated funds (total accumulated contributions) into ERS from the State of Maryland retirement system or any city (including Baltimore City), county municipal retirement system within the State of Maryland if there is no more than a 30-day break in service between prior employment and employment with the City of Baltimore. **IMPORTANT NOTE: When you become a member of ERS Class D pension system after completing one year of service from your hired/rehired date, your request for transfer of service credit and associated funds from your prior retirement system must be made within one (1) year of becoming an ERS (Class D) pension member.**

HOW TO TRANSFER SERVICE CREDIT & FUNDS TO ERS: There is a two-step process to transfer service credit and associated funds (total accumulated contributions) to ERS within one year of membership in the Hybrid Class D pension system.

1) **Step 1: ERS Request For Record Of Service Form**: The new ERS Class D member must complete the top portion of the enclosed ERS **Request For Record Of Service** Form.
    a. Fill in the name of the prior retirement system, your personal and employment information, your signature and date.
    b. Contact ERS by phone at 443-984-3200 or email at contactERS@bcers.org to be assigned to a Retirement Analyst (RA) that will walk you through the process.
    c. Submit the form to your assigned Retirement Analyst (RA) via your RA's direction. Your RA will review, approve, sign-off on the form and forward the form to your prior retirement system for completion and certification.

2) **Step 2: Withdraw Total Accumulated Contributions From Prior Retirement System:** In order to transfer your service credit and funds to your ERS (Class D) membership, you must withdraw your total accumulated contributions from your prior retirement system. Contact your prior retirement system to rollover your total accumulated contributions to ERS. You must select the rollover option on your prior retirement system's Withdrawal Election Form and designate "Baltimore City ERS" as the Employer Retirement Plan. **Note:** In addition, you should receive a written notification from your prior retirement system indicating that your retirement account has been closed. Submit a copy of this notification to your assigned Retirement Analyst.
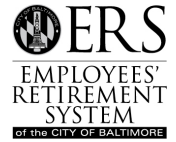
    IMPORTANT NOTE: When transferring service credit to ERS, the total associated funds (accumulated contributions) must also be transferred to ERS even if the employee contribution rate made to the prior retirement system is greater than the employee contribution rate made to ERS as a Class D member. **Transfers of service credit from other governmental plans within Maryland to the Employees' Retirement System (ERS) are governed by the State Personnel and Pensions Article of the Maryland Code. Employees transferring from a Contributory Maryland County or Municipal Plan must deposit the total accumulated contributions from the prior retirement plan into ERS.**

POSTING SERVICE CREDIT & FUNDS TO ERS MEMBERSHIP: When your assigned Retirement Analyst receives the completed ERS Request For Record Of Service Form**,** a check payable to "Baltimore City ERS" for the total accumulated contributions and the written notification that your account has been closed from your prior retirement system, your service credit and total accumulated contribution amount will be posted to your ERS Class D pension membership account. Once posted to your ERS membership account, you will be able to view the accumulated service credit and total accumulated contributions on the Member Service Portal at www.bcers.org under Member Service – Self Service Login – View Your Pension Data – Service *(Accumulative Service Credit)* & Closing Balance as of the current date *(Accumulated Contributions)*.

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REQUEST FOR RECORD OF SERVICE

To the Board of Trustees of _____
NAME OF PRIOR SYSTEM

I am an active member of the City of Baltimore Employees' and Elected Officials' Retirement Systems ("Retirement Systems"). I authorize you to release my service credit record and return this completed form to the Retirement Systems at the above address. If I decide to transfer my service credit to the Retirement Systems pursuant to the provisions of the Maryland Code, State Personnel and Pensions Article, Sections 37-101 et seq., I will notify you of my transfer decision.

Name_____
LAST   FIRST   MIDDLE   MAIDEN

Date of Birth _____ Last 4 SSN _____

Address _____

Previous employer _____

Approximate dates of employment _____

Member Signature _____ Date_____

_____
* ABOVE INFORMATION VERIFIED BY ERS ANALYST *

ERS Analyst Name_____

ERS Signature_____ Date_____

_____
* THIS SECTION TO BE COMPLETED BY PRIOR SYSTEM *

Service Credit Record Completed By_____

1. Is your retirement system operated on an actuarial basis?   ❑ Yes   ❑ No

2. Did your retirement system require employee contributions throughout the applicant's entire membership? ❑ Yes   ❑ No

   If no, during what period of the applicant's membership were employee contributions required? From _____ to _____ .

3. What was the rate of employee contributions? _____

4. Is applicant vested?   ❑ Yes   ❑No

Revised 03/2025

5. Have accumulated contributions been refunded to applicant by your system? ❑ Yes   ❑ No

   If yes, amount refunded _____ Date of refund _____

5a. Pre-Tax Contribution _____ Post-Tax Contribution_____ Interest_____

6. Total membership service credit _____

   Dates of membership service credit.   YEARS   MONTHS   DAYS

   From _____ To _____ From _____ To _____

   From _____ To _____ From _____ To _____

   From _____ To _____ From _____ To _____

7. Does total membership service credit include **military service** during employment or prior to

   employment? ❑ Yes   ❑ No

   If yes, total military service credited _____

                    YEARS   MONTHS   DAYS

8. Describe your retirement system's benefit formula.

_____

_____

_____

9. Provide all salaries paid and effective dates for the applicant's membership in your system.

Attach additional sheets if necessary.

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

   Amount _____ From _____ To _____

CERTIFICATION

I certify that the above information was taken from the official records of this retirement system.

NAME OF RETIREMENT SYSTEM	SIGNATURE OF AUTHORIZING OFFICIAL
STREET ADDRESS	NAME AND TITLE OF AUTHORIZING OFFICIAL
CITY STATE ZIP	DATE
PHONE NUMBER	FAX NUMBER