

**RETIREMENT PLAN ELECTION****Post-Doctoral Research Associates only**

CO-931 PD-II

This form should be completed for all currently employed Post Doctoral research associates at the University of Connecticut (excluding UConn Health) who were hired on or after November 19, 2021. The form must be signed by the employing agency and the employee and returned to the Retirement Services Division as soon as possible following the Post Doctoral Research Associate's employment date or post-hire enrollment date resulting from a recent eligibility status determination.

**CHECK TYPES OF ACTIONS BEING SUBMITTED ON THIS FORM****I. EMPLOYEE'S PERSONAL INFORMATION**

LAST NAME	FIRST NAME	MI	EMPLOYEE NO	SOCIAL SECURITY NO.	DATE OF BIRTH	GENDER <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE
ADDRESS (No., Street, City, State, Zip Code)						
MARITAL STATUS <input type="checkbox"/> MARRIED <input type="checkbox"/> SINGLE	DATE OF MARRIAGE	NAME OF SPOUSE				

**II. EMPLOYMENT INFORMATION**

EMPLOYING AGENCY UConn-Storrs	RECORD NO.	AGENCY ADDRESS 9 Walters Ave., Storrs, CT 06269			
EMPLOYMENT DATE	BARG. UNIT 31	CORE-CT JOB CODE AA9001	EMPLOYMENT STATUS <input type="checkbox"/> Full-time <input type="checkbox"/> Part-time	TYPE STATUS Durational	

**III. RETIREMENT ELECTON INFORMATION**

- Option 1 – Alternate Retirement Program – employee contribution 5%, prospective only
- Option 2— Waiver of retirement plan membership

**IV. AGENCY SECTION**

EMPLOYEE CODE	START DATE __/__/__
EMPLOYER CODE	START DATE __/__/__

**V. PARTICIPANT'S STATEMENT**

I understand that this is an irrevocable decision, and I cannot at a later date select another retirement plan participation option.

EMPLOYEE'S SIGNATURE	EMPLOYEE NUMBER	DATE
AUTHORIZED AGENCY SIGNATURE & TITLE	PHONE NO. 860-486-3034	DATE

**DESIGNATION OF RETIREMENT PLAN BENEFICIARY FORM FOR ACTIVE/INACTIVE MEMBERS**

CO-999 6/2018

STATE OF CONNECTICUT  
OFFICE OF THE STATE COMPTROLLER  
RETIREMENT SERVICES DIVISION

**I. EMPLOYEE PERSONAL INFORMATION**

MEMBER STATUS: NEW MEMBER <input type="checkbox"/> ACTIVE MEMBER <input type="checkbox"/>				INACTIVE MEMBER <input type="checkbox"/>		
				INACTIVE MEMBERS (ONLY):		
				NEW ADDRESS <input type="checkbox"/>		NAME CHANGE <input type="checkbox"/>
LAST NAME	FIRST NAME	M.I.	EMPLOYEE NO.	SOCIAL SECURITY NUMBER	DATE OF BIRTH	GENDER MALE <input type="checkbox"/> FEMALE <input type="checkbox"/>
ADDRESS (Street No., Name) (City, State, Zip Code)						
MARITAL STATUS	MARRIED <input type="checkbox"/> SINGLE <input type="checkbox"/>	DATE OF MARRIAGE	NAME OF SPOUSE			

**II. BENEFICIARY DESIGNATION**

- I Type or PRINT clearly.
- I You may name any living person, your estate, a trust, or a charitable organization as your beneficiary.
- I At least one beneficiary must be named. If more than one primary beneficiary is named, the share of the beneficiary who dies before you shall be divided equally among the surviving beneficiaries.
- I A payment is made to a contingent beneficiary(ies) only if all primary beneficiaries die before you do.
- I If you survive all of the beneficiaries named, payment would be made to your estate.
- I To designate a trust as beneficiary enter the name and date of the trust agreement in the Beneficiary section of this form; leave the Relationship and Social Security sections blank; and indicate Primary or Contingent.
- I To designate your estate as beneficiary enter the word "Estate" in the beneficiary section of this form; leave the Relationship and Social Security sections blank; indicate Primary or Contingent.

Primary beneficiary(ies) must equal 100%. Contingent beneficiary(ies) must equal 100%. Please use whole percentages. If there are more than (4) beneficiaries designated, check the box to the right and attach an additional CO-999 form listing additional beneficiaries.

NAME OF BENEFICIARY PRIMARY <input type="checkbox"/>			SOCIAL SECURITY NUMBER	NAME OF BENEFICIARY PRIMARY <input type="checkbox"/> CONTINGENT <input type="checkbox"/>			SOCIAL SECURITY NUMBER
Last Name	First Name	M.I.		Last Name	First Name	M.I.	
ADDRESS (Street No., Name)			RELATIONSHIP	ADDRESS (Street No., Name)			RELATIONSHIP
(City, State, Zip Code)		PERCENT	DATE OF BIRTH	(City, State, Zip Code)		PERCENT	DATE OF BIRTH
NAME OF BENEFICIARY PRIMARY <input type="checkbox"/> CONTINGENT <input type="checkbox"/>			SOCIAL SECURITY NUMBER	NAME OF BENEFICIARY PRIMARY <input type="checkbox"/> CONTINGENT <input type="checkbox"/>			SOCIAL SECURITY NUMBER
Last Name	First Name	M.I.		Last Name	First Name	M.I.	
ADDRESS (Street No., Name)			RELATIONSHIP	ADDRESS (Street No., Name)			RELATIONSHIP
(City, State, Zip Code)		PERCENT	DATE OF BIRTH	(City, State, Zip Code)		PERCENT	DATE OF BIRTH

**III. MEMBER'S STATEMENT**

I hereby revoke all previous appointments of beneficiaries made by me, if any, and designate the person(s) named above as beneficiary(ies) such person(s) to receive upon my death any and all sums due me from the Retirement System of which I am a member. This designation shall remain in effect unless I subsequently change it by written notice to the Retirement Services Division.

EMPLOYEE'S SIGNATURE	DATE
AUTHORIZED AGENCY SIGNATURE (& TITLE)	PHONE 860-486-3034
	DATE

Forward completed form to: Retirement Services Division, Customer Service Center, 55 Elm Street, Hartford, CT 06106. Agency should retain one copy and provide one copy to employee.