



Eligibility Assessment for Employer Retirement Contributions

Please read about each of the four potential eligibility statuses below, and check all that apply:

I recently worked for another college or university

If you worked for another college or university and your employment with the other institution ended within 90 days of your date of hire at Smith College, you may be credited with up to a Year of Eligibility Service. If this situation applies to you, you must submit documentation to substantiate your eligibility for credit of up to a Year of Eligibility Service. Please return this form, along with the following documentation to Human Resources:

- Eligibility Verification** form, completed by your previous institution
OR
- A copy of your quarterly retirement plan statement** from your previous institution's plan, showing employer contributions made within 90 days of your date of hire at Smith

It is important that you return the necessary documentation as soon as possible.
Contributions will not be made retroactively.

You become a member of the retirement plan for purposes of employer contributions as of the first of the month following the date on which you provide documentation showing that you meet the plan's eligibility requirements. You are eligible upon your date of hire for the purposes of making voluntary pre-tax salary deferrals and Roth contributions from your earnings; please complete a Retirement Plan Election Form, Salary Reduction Agreement if you wish to make voluntary contributions.

I have worked at Smith College previously

If you are being re-hired, the hours that you previously worked for Smith College may be counted toward a Year of Eligibility Service. Please submit this form to Human Resources as soon as possible so that we can research your eligibility status.

I have received employer retirement contributions from Smith College previously

You will continue to receive employer contributions on eligible earnings.

I am a New Hire at Smith College

To be eligible for employer contributions under the Smith College Defined Contribution Retirement Plan, employees must be at least 26 years old, and have completed a Year of Eligibility Service. Once you have met these requirements, HR will enroll you in the plan and mail you a plan guide. There are no enrollment forms required.

I confirm that the information provided on this form is true and correct.

Employee Signature: _____ Date: _____

Name, Last: _____ First: _____ MI: _____
Please print Please print

Email: _____ Birthdate: _____ Age: _____

Date of hire: _____ Department: _____ Smith ID#: _____