



MEMBER ACTION (001)
 NORTH DAKOTA RETIREMENT AND INVESTMENT OFFICE
 TEACHERS' FUND FOR RETIREMENT DIVISION
 SFN 50981 (7-2018)

Please see reverse side for important information on death benefits, naming a beneficiary, and purchasing refunded service credit.

In compliance with the Federal Privacy Act of 1974, the disclosure of the individual's social security number on this form is mandatory pursuant to 26 U.S.C. § 3402. The individual's social security number is used for tax reporting and as an identification number. Penalty for not including the social security number may cause the form to not be processed.

Name (First, Middle, Last)		Social Security Number		Gender	Birth Date
Mailing Address (Street or Box)			City	State	ZIP Code
Married <input type="checkbox"/>	Single <input type="checkbox"/>	Maiden Name	Name of Spouse (First, Middle, Last)		Gender
School District /Employer	Work Telephone Number	Home Telephone Number	E-mail Address		
1. I have a current ND teaching license. <input type="checkbox"/> Yes <input type="checkbox"/> No (Substitute teacher license not acceptable)					
2. I have a contract or other written employment agreement with the employer named above. <input type="checkbox"/> Yes <input type="checkbox"/> No					
3. I am (Check only one):					
<input type="checkbox"/> New, first time TFFR member. Complete #4 and a TFFR Designation of Beneficiary Form					
<input type="checkbox"/> Active TFFR member changing or adding an employer.					
<input type="checkbox"/> Inactive TFFR member returning to covered employment.					
<input type="checkbox"/> Refunded TFFR member returning to covered employment. Complete #4					
<input type="checkbox"/> On a leave of absence for school year(s) _____.					
<input type="checkbox"/> Returning from a leave of absence effective _____.					
<input type="checkbox"/> Retired TFFR member returning to covered employment under Exception B-Benefit Suspension and Recalculation.					
Under all options, please complete a separate TFFR Designation of Beneficiary form, SFN 10341, to name or update your designated beneficiary.					
4. I have previous ND employment covered by the Public Employees Retirement System (PERS).					
<input type="checkbox"/> Yes <input type="checkbox"/> No Where _____ When _____					
I have previous ND employment covered by the Highway Patrol Retirement System (HPRS).					
<input type="checkbox"/> Yes <input type="checkbox"/> No Where _____ When _____					

Member's Signature

I certify the above information is an accurate description of my employment status and TFFR plan participation. I have also read and understand the information on the reverse side.

Signature of Member
Date

Return to:
 ND Retirement and Investment Office
 3442 East Century Avenue
 PO Box 7100
 Bismarck ND 58507-7100
 www.nd.gov/rio

Telephone: 701-328-9885
 Toll free: 800-952-2970
 Fax: 701-328-9897

This form is available in an alternate format upon request.

TFFR Membership

New and returning TFFR members are required to complete and sign a Member Action Form to properly enroll in the TFFR plan. Active, inactive, and retired members who had service prior to July 1, 2008 are Tier 1 members. New members and returning refunded members employed on or after July 1, 2008 are Tier 2 members. Tier 1 members who were within 10 years of retirement eligibility as of June 30, 2013 are Tier 1 grandfathered members. The following highlights the different benefit structure for each tier:

	Tier 1 Grandfathered	Tier 1 Non-grandfathered	Tier 2 Non-grandfathered
Early Unreduced Retirement Vesting	Rule of 85 3 Year	Age 60 & Rule of 90 3 Year	Age 60 & Rule of 90 5 Year
Final Average Salary	High 3	High 3	High 5
Reduced Retirement Factor	6%	8%	8%

Previous Teaching or State Experience covered by TFFR, PERS, or HPRS

Active TFFR members are eligible to repay TFFR refunded service credit for use toward retirement eligibility and benefits. You may also qualify as a dual member if you have service credit in TFFR and PERS or HPRS. Contact the Administrative Office for additional information.

Naming a Beneficiary – Complete separate form SFN 10341

TFFR members should designate a beneficiary(ies) in writing for the purpose of directing payment of a claim due to a member's death.

If you are married,* you must name your spouse as beneficiary or provide written spousal approval to name an alternate beneficiary. If you are not married, or if you have written spousal consent, you can name any person (up to 10), organization, church, or charity as beneficiary of your retirement account. However, if more than one beneficiary is named, they are not eligible to receive a monthly annuity for life. Also, if more than one person is named as beneficiary, they will share equally in the survivor benefit unless specific percentages are designated. If specific percentages are designated, they must equal 100 percent.

If you do not designate a beneficiary, death benefits (if any) will be paid to your surviving spouse; if none, to your estate.

*Same gender marriages are recognized as legal marriages in all states. Married same gender couples receive all the legal rights and benefits afforded to married opposite gender couples.

Naming a contingent beneficiary(ies) is **optional**. A contingent beneficiary should be designated if you do not wish survivor benefits to be paid in the order provided by state law (surviving spouse, estate). Benefits will be paid to your contingent beneficiary only if your primary beneficiary is deceased.

Your beneficiary designation is subject to the governing statutes and rules and regulations established by the Board of Trustees of the ND Teachers' Fund for Retirement. The acceptance of this designation does not establish that a survivor benefit will be payable. Whether or not a benefit is payable and the amount thereof will be determined at the time of death under laws and regulations then applicable.

Death Benefits

If a member's death occurs prior to retirement, the beneficiary/survivor of a non-vested member will be eligible for a refund of account value (member contributions plus interest). Survivors of vested members will be eligible for: 1) refund of account value; or 2) monthly reduced annuity for life under 100% Joint and Survivor option (not available if more than one beneficiary is named). (See Tier 1 and Tier 2 member vesting descriptions.)

If a member's death occurs after retirement, the death benefit your beneficiary/survivor receives (if any) is based on the plan you select at retirement.

**Additional membership and death benefit information can be found in the TFFR Handbook on our website--
www.nd.gov/rio/tffr.**

If you have any questions, please contact the Administrative Office.