

MEMBER ACTION (001)

NORTH DAKOTA RETIREMENT AND INVESTMENT OFFICE
TEACHERS' FUND FOR RETIREMENT DIVISION
SFN 50981 (7-2023)

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.

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

Name (First, Middle, Last)		Social Security Number	Gender	Date of Birth
Primary Mailing Address		City	State	ZIP Code (9-digit)
Married	Single	Maiden Name	Name of Spouse (First, Middle, Last)	
School District /Employer		Work Telephone Number	Primary Telephone Number	E-mail Address
Gender				

1. I have a current ND teaching license. Yes No (Substitute teacher license not acceptable)
 License # _____ Exp. Date _____

2. I have a contract or other written employment agreement with the employer named above. Yes No

3. I am (Check only one):

- New, first time TFFR member. **Complete #4**
- Active TFFR member changing or adding an employer.
- Inactive TFFR member returning to covered employment.
- Leave of absence for school year(s) _____.
- Refunded TFFR member returning to covered employment. **Complete #4**
- Returning from a leave of absence effective _____.
- Retired TFFR member returning to covered employment under Exception B-Benefit Suspension and Recalculation.
- Retired military personnel exemption. Provide a copy of DD214 (Certificate of Release or Discharge from Active Duty).

Under all options except retired military personnel exemption, complete a 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).
 Yes No Where _____ When _____

I have previous ND employment covered by the Highway Patrol Retirement System (HPRS).
 Yes No Where _____ When _____

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.

Member Signature

Date

RETURN TO:
 ND Retirement and Investment Office
 PO Box 7100
 Bismarck ND 58507-7100

Telephone: 701-328-9885
 Toll free: 800-952-2970
 Fax: 701-328-9897
 Email: rio@nd.gov

Teachers' Fund for Retirement Membership

New and returning Teachers' Fund for Retirement (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	Rule of 85	Age 60 and Rule of 90	Age 60 and Rule of 90
Vesting	3 Year	3 Year	5 Year
Final Average Salary	High 3	High 3	High 5
Reduced Retirement Factor	6%	8%	8%

Previous Teaching or State Experience

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 Public Employees Retirement System or Highway Patrol Retirement System. Contact the Retirement and Investment Office for additional information.

Naming a Beneficiary

TFFR members should designate **by completing a Designation of Beneficiary form (SFN 10341)** 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 or beneficiaries 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 TFFR Board of Trustees. 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 benefits 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 Member Handbook on the Retirement and Investment Office (RIO) website, www.rio.nd.gov.

If you have any questions, please contact RIO.

This form is available in an alternate format upon request.