

# Essex Regional Retirement System

## New Member Enrollment Administrator Checklist

### Member Enrollment Form

- Employer (Town, Housing Authority or District) provided
- Verify Position and Start Date
- New Member has signed and dated middle of page two
- Payroll/Personnel Department Section completed and signed by completing official. Be sure to include compensation information

### Beneficiary Selection Form

**For Payout of Accumulated deductions in the event of death of member:**

- At least one beneficiary is provided with beneficiary SSN. If multiple beneficiaries are provided please insure that all SSNs are provided and Proportions to be paid add up to 100%.
- New Member has signed and dated the Beneficiary Selection Form
- Beneficiary Form is also completed and signed by a witness **that is NOT a beneficiary**. Note that it is acceptable that the official administering the enrollment form at the time of hire witness the Beneficiary Selection Form.

### Choice of Option (D) Beneficiary

*Not Required, but if completed allows beneficiary of deceased and vested member to receive prorated annuity payments at the time the member would have received had member been able to retire under Option (C).*

- Verify beneficiary provided is an eligible relationship\* and beneficiary SSN included.
- New Member has signed and dated the Option (D) Beneficiary Selection Form
- Option (D) Beneficiary Form is also completed and signed by a witness **that is NOT a beneficiary**. Note that it is acceptable that the official administering the enrollment form at the time of hire witness the Beneficiary Selection Form.

### Attachments

Please request new member to also provide the following when completing new hire paperwork:

- Copy of Birth Certificate of New Member
- Copy of Military Discharge if New Member is a Veteran
- Copy of Birth Certificate of Option (D) Beneficiary
- Copy of Marriage Certificate if Option (D) Beneficiary is Member's Current or former Spouse
- Completed Social Security Administration Windfall Provision Form 1945

\* An eligible Option (D) beneficiary is defined under M.G.L.c.32, s. 12(2)(d) as the spouse, former spouse who has not remarried, child, father, mother, sister or brother of the member.