



Chicago Teachers' Pension Fund

APPLICATION FOR MILITARY SERVICE

FORM 625

(rev. 5/2013)

203 North La Salle Street, suite 2600 | Chicago, Illinois 60601-1231 | Phone: 312 641 4464 | Fax: 312 641 7185

APPLICATION FOR MILITARY SERVICE

The purchase of military service for public employees is a benefit designed to partially compensate veterans for their service in the armed forces. Any **active duty** military service credit purchased, is applied toward the calculation of your CTPF benefits. Eligibility for a pension or retirement pay from the U.S. government does not affect your eligibility to purchase military service with CTPF. **Please read the requirements, the instructions and the application form carefully and complete all information as requested.** Incomplete forms will necessitate additional communication and delay the processing of the request.

REQUIREMENTS

- To apply to purchase military teaching service credit you must be a regularly certified, **full-time appointed teacher contributing to CTPF.**
- Your application to purchase military service credit must be received by CTPF and payment completed before you receive your first retirement check from CTPF or another retirement system covered by the Illinois Retirement Systems Reciprocal Act (if retiring under reciprocity).
- You may purchase a maximum of 5 years **active duty**, two of which may precede your teaching career with a CTPF-covered employer
- For military service which interrupted participation you must have contributed to CTPF or TRS prior to the military service and must return to service with CTPF after military service; your contributions must have been left on file and you must be currently contributing to CTPF.
- A copy of your DD-214 attesting to the validity of the dates of your active military service must accompany this completed application. To obtain a copy of your DD-214, send a request to:

National Personnel Records Center
(Military Personnel Records)
9700 Page Avenue
St. Louis, MO 63132-5100

PAYMENT OF CONTRIBUTIONS AND INTEREST

- Cost to purchase service prior to participation:** Member contributions and employer cost of the benefit plus 5% interest, compounded annually from the date of your appointment in CTPF to the date of repayment. Salary used to calculate cost is salary from first date of appointment as a regularly certified teacher. **This service credit will not be added to your account until you have paid the entire bill.**
- Cost to purchase service which interrupted participation:** Member contributions plus 5% interest compounded annually beginning one year from the date of your return to teaching service as a regularly certified teacher. Salary used to calculate cost is the rate in force on return to teaching service as a regularly certified teacher. **This service credit will not be added to your account until you have paid the entire bill.**
- CTPF will mail you a Service Purchase Contract which offers the following payment plan options:
 - Lump-sum option — applicant pays the total cost with a single payment.
 - Installment payment option — applicant pays a series of installment payments directly to CTPF.
 - A combination of the two payment options.
- You may pay for this service through a rollover from a traditional IRA (NOT a ROTH IRA) a 401, 403(b), 457(b), or other qualified pension plan. **Please complete and submit Form 435 Certification for Tax-deferred Rollover** for determination of eligibility.

INSTRUCTIONS FOR COMPLETING THE FORM

SECTION 1 MEMBER INFORMATION

- Please provide your legal name, address, social security number, etc.
- Optional: your anticipated retirement date.
- Former name: If you previously participated in CTPF under a different name, please provide it here.
- Participation in TRS: If you participated in TRS prior to military service, please provide dates of participation.

SECTION 2 DATES OF ACTIVE MILITARY SERVICE

- Provide the dates of your active military service.

SECTION 3 MEMBER CERTIFICATION

- Provide requested information, sign, and date.

Call Member Services, (312) 641-4464, if you have questions regarding the completion of this application.



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(rev. 11/2010)

PLEASE PRINT OR TYPE. Read attached Instructions before completing application

SECTION 1 – MEMBER INFORMATION

Legal name	first	middle initial	last	suffix	Last 4 digits of SSN	
Mailing address	street		apt. or unit no.	city		state zip code
Telephone number (with area code)			Date of birth		Optional: anticipated retirement date:	
Former name			TRS participation (provide date of your participation if applicable)			
E-mail address						

SECTION 2 – DATES OF ACTIVE MILITARY SERVICE

I am establishing **active military service** as CTPF service credit under the following designation:

Dates of **active military service** prior to CTPF participation: _____ to _____

Dates of **active military service** which interrupted CTPF or TRS participation: _____ to _____

SECTION 3 – MEMBER CERTIFICATION

I hereby certify that:

I served in active duty in the Armed Forces of the United States during the dates indicated above.

I began contributing to CTPF on: _____
DATE

Name of current school: _____

I have attached the DD-214 from the military attesting to the validity of the dates of my active military service.

Member Signature	Date
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