



APPLICANT INFORMATION:

Please complete this section **only** and return to IU Human Resources - ATTN: 18/20 Plan, Poplars Building Room E165, 400 East Seventh Street, Bloomington, IN 47405-3085

Name: _____ 10-Digit University ID: _____

Present Position: _____ Dept.: _____ Campus: _____

Post-Retirement Mailing Address: _____

Post-Retirement Email Address: _____

Date of Birth: ____/____/____ Retirement Date: ____/____/____

I wish to enter into the IU 18/20 Early Retirement Plan as of the retirement date indicated above. I have received a copy of and understand the provisions of the IU 18/20 Retirement Plan. I understand that continued 403(b) contributions to the IU Retirement Plan are subject to Internal Revenue Code rules and regulations, and any "excess" contributions will be paid to me as "wages", subject to income and FICA taxes.

Signature: _____ Date: ____/____/____

FOR HR USE ONLY

CONFIRMATION OF ELIGIBILITY AND BENEFIT AMOUNT:

Date of Initial Full-Time Appointment: ____/____/____ Age at Termination: _____

Date of Initial IU Contributions to the IU Retirement Plan: ____/____/____ Years of IU Contributions: _____

To Retirement: _____ Years _____ Months _____ Month Appointment

Less Absences (e.g. LWOP): _____ Years _____ Months

Total Creditable Service at Retirement: _____ Years _____ Months

Note any breaks in service: _____

Annualized Contributions to IU Retirement Plan: \$ _____ *

Monthly Contributions to IU Retirement Plan: \$ _____ *

Month/Year Benefits Begin: _____ Month/Year Benefits End: _____ **

Interim Benefit not available to those employed after July 14, 1988.
See IU Replacement Retirement Plan.

* Subject to IRS limitations.

** Except benefit will end upon the participant's gainful employment or death, if earlier.

Signature: _____ Date: ____/____/____

Retirement Plan Administrator

APPROVAL: Payment of interim benefits and continued 403(b) contributions indicated above is approved under the conditions of the IU 18/20 Early Retirement Plan.

Signature: _____ Date: ____/____/____

IU Human Resources