



Request for Cost Estimate to Purchase Service Credit

Carefully review this form for accuracy before submitting it to ERFC. If you want to purchase 5 or more years of service credit, you must also submit **Employment Verification Form (ERFC 8)**, available on the Forms and Publications page on ERFC's website under "Member Forms." ERFC must receive all your documentation before any cost estimates can be provided. Your ERFC service credit estimate(s) will be mailed to your home address within 30-45 days of receiving all your completed documentation.

PLEASE NOTE

- To purchase service credit, you must be an ERFC Legacy Plan member (hired before July 1, 2001). Members of the ERFC 2001 Tier 1 and Tier 2 Plans cannot purchase ERFC service credit.
- You may purchase service credit using rollover checks from other qualified retirement plans, individual retirement accounts (IRAs), tax-deferred annuity 403(b) plans, and certain deferred compensation plans [457(b)]. However, some restrictions apply. We recommend seeking assistance from your financial institution to ensure an appropriate transfer of funds. Service credit purchases are not refundable, except under certain limited circumstances.

SUPPORTING DOCUMENTATION

- Satisfactory verification of your age (a copy of your birth certificate or passport)
- Employment Verification Form (ERFC 8)—available on the Forms and Publications page on ERFC's website under "Member Forms"
- Satisfactory verification that you are not eligible for a retirement benefit from another retirement system during the same employment period for which the service credit is sought [see ERFC Employment Verification Form (ERFC 8)]
- If you're seeking credit for Favorable Impact Service for prior employment, supporting documentation must be provided to and approved by ERFC before service credit payment can be accepted or processed.

Purchases of less than five years of service credit may not require the documentation cited in items 2 and 3 if the same information was submitted and accepted by FCPS at the time of hire and remains on file.

IMPORTANT CONSIDERATIONS

- The purpose of purchasing additional service credit with ERFC is to attain 25 years of service as close as possible to age 55. If your total service at age 55 (including this service purchase) is less than 25 years, you may wish to reconsider this purchase. Generally, it isn't advantageous to purchase service credit to exceed a total of 25 years of service.
- Purchased service does not count toward vesting credit with ERFC.
- The maximum amount of service credit that may be purchased is 10 years unless it is withdrawn from other eligible employment with FCPS or the Fairfax County government.
- You must submit verification from the Virginia Retirement System (VRS) confirming that any Leave of Absence (LOA) credit claim is also eligible for purchase in their system, whether or not you choose to purchase the LOA credit from VRS as well.

Member's Last Name _____ First Name _____ Middle Initial _____

Street Address _____ Apt. No. _____ City _____ State _____ Zip Code _____

Employee No. or SSN (last 4 digits) _____ Birth Date (MM/DD/YYYY) _____ Phone Number (with area code) _____

ERFC is open M-F, 8 a.m.-4:30 p.m. When is the best time to call if we have questions about your request? _____

WHAT DO YOU WANT TO DO? (CHECK ONE)

- I want to purchase _____ years and _____ months of service credit.
- I'm trying to reach _____ years of service credit by age _____.

For example: You may want to buy 3 years 7 months of service credit OR you may be trying to reach 25 years of service by age 55.

TYPE OF SERVICE TO BE PURCHASED (CHECK ONE)

- Full-time service as an FCPS educational employee
- Full-time service as an educational employee outside FCPS or at a private school
- Full-time service in other employment deemed to have a favorable impact on your FCPS position
- Up to five years of full-time service in any other employment
- Part-time service with FCPS or Fairfax County as a member of FCERS
- Leave of absence from FCPS

Member Signature _____

Date (MM/DD/YYYY) _____