



Utah Retirement Systems
PO Box 1590
Salt Lake City, UT 84110-1590
801-366-7318 | 800-753-7318
www.urs.org

REQUEST FOR EXEMPTION

Tier 1 Public Employees Contributory or Noncontributory Retirement Systems

EMPLOYER INSTRUCTIONS:

EMPLOYEE INSTRUCTIONS:

1. Please type or print clearly in black ink.

2. Complete section A and give to the employee to verify information, sign and return. Keep a copy for your records and forward original to the Retirement Office. Add the position to your annual Exemption plan where applicable.
3. Review section A for accuracy. Read and complete Section B. Your signature is required to complete the request for exemption. Return this form to your employer.
4. If you or your employer will be contributing to a Defined Contribution plan please set up allocations and deferrals at our web site www.urs.org through the myURS member log in.

SECTION A - EMPLOYEE INFORMATION AND EXEMPT CLASSIFICATION - TO BE COMPLETED BY EMPLOYER

Employee Name (first, middle, last)	Date of Birth (mm/dd/yyyy)	Social Security Number
Mailing Address	City	State Zip
Name of Employer	Employer Number	Employee Position
		Date Hired

☐ **Exempt Administrative Position** As an employee in a position not entitled to merit or civil service protection and designated by my employer as qualified for exemption, I choose to EXEMPT from membership in Utah Retirement Systems as of _____.
(Date)

☐ **Exempt Appointed** As an appointed official not entitled to merit or civil service protection and designated by my employer as qualified for exemption, I choose to EXEMPT from membership in Utah Retirement Systems as of _____.
(Date)

Monthly Earnings	Beginning Date of Term	Ending Date of Term	How many months per year are required for this position?
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☐ **Exempt Elected** As an elected official eligible for retirement coverage, I choose to EXEMPT from membership in Utah Retirement System membership as of _____.
(Date)

Monthly Earnings	Beginning Date of Term	Ending Date of Term	How many months per year are required for this position?
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☐ **Exempt Full-Time Student, Spouse of Full-Time Student, or as a Trainee** As a full-time student, the spouse of a full-time student or an individual employed in a trainee relationship. I choose to EXEMPT from the Utah Retirement Systems. I agree to notify my employer and the Retirement Office should my status change in any way, making me ineligible for continuing exemption. I choose to EXEMPT from membership in Utah Retirement Systems as of _____.
(Date)

☐ **Employee of an Interlocal Cooperative Agency** As an employee of an interlocal cooperative agency created under Title 11, Chapter 13, Interlocal Cooperation Act, who is engaged in a specialized trade customarily provided through membership in a labor organization that provides retirement benefits to its members, I choose to EXEMPT from membership in Utah Retirement Systems as of _____.
(Date)

The employer certifies that this employee is eligible for service credit for the reason noted above. By remitting contributions, the employer makes a continuing certification the employee is eligible for service credit. The employer must notify the Retirement Office when the employee becomes ineligible or terminates employment.

Authorized Signature (required)	Date
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SECTION B - DEFINED BENEFIT - EMPLOYEE SECTION

I am exempting from a Defined Benefit System. If I have member contributions with URS from previous URS Retirement coverage, I understand I am not eligible for a refund of contributions from my defined benefit pension plan, since I have not separated from employment. I may request a direct transfer of member contributions to a qualified defined contribution plan (contact URS Retirement Department for more information). I further understand I will not accrue service credit toward a monthly retirement allowance during the period of exemption.

Employee Signature (required)	Date
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PERTINENT INFORMATION FOR EXEMPTIONS

Exemption Time Frames

Exemption elections are subject to certain timing restrictions. Generally, exemptions may only be made when an employee initially begins employment with an employer and prior to participation in any retirement plan of the employer. Once an employee has participated with any plan of the employer, employees are prohibited from making a participation election, including to elect exemption or revoke an exemption, throughout the duration of their employment with that employer, regardless of position changes, promotions, or a termination and rehire.

Service Accrual

Employees don't accrue service credit towards a defined benefit retirement during the period of exemption.

Exemption Cancellations

Generally, an exempt employee may not elect to revoke or cancel any exemption. Once the exemption election has been made and the plan participation has begun, the employee must remain in that plan for the duration of the employee's employment with that employer unless an employee changes positions to one that is not eligible to exempt. Employees who are in a position that no longer qualifies for exemption from specific coverage or vesting shall be returned to the participation or vesting requirements of the system in which they should be participating.

Transfer of Contributions

Employees who exempt are not eligible for a refund of member contributions, because they have not separated from employment; however, they may request a direct transfer of member contributions, if any, to a qualified defined contribution plan administered by our office. Contact the Retirement Benefits Department (801-366-7770 or 800-695-4877) for more information.

See this
video for an
overview of
exempting
rules and
processes.

