



## Utah Retirement Systems

### What to Expect when completing a Service Purchase

- 1) You must have at least 4 years of eligible service with URS to purchase service credit
- 2) Contact URS to request forms at least 6 months before you want to purchase service
- 3) Most purchases require 2 forms:
  - a) "Request for Service Purchase Cost" This form is completed by you
  - b) "Application to Purchase..." Section A is completed by you  
Section B is completed by your former employer  
Section C is completed by your former retirement system
- 4) Submit "Request for Service Purchase Cost" to URS. Send the "Application to Purchase..." forms to your former employer(s) and retirement system(s) whose service you are wanting to purchase

*It is advised that you find a contact person at your former employer and at your former retirement system so you can track their progress on completing the requested forms*

- 5) *It can take several months to get all paperwork submitted from former employer(s) and retirement system(s) (URS will not contact them for you)*
- 6) All forms must be completed correctly and returned to URS before eligibility can be determined
- 7) Incomplete or incorrect forms will be returned to you so you can resubmit them to the correct agencies for completion
- 8) Once all forms have been received, eligibility will be determined
- 9) If eligible, an exact cost will be sent to you with payment options
- 10) Once you receive this exact cost, select payment option(s) and return the Exact Service Purchase Cost to URS with payment or rollover form by due date
- 11) If rolling funds from an outside qualified plan, you must contact them to start the rollover process to URS (**URS will not contact them for you**)

- For additional information, see the Purchasing Service Credit Brochure