



Disclosure of Prior Retirement Plan Participation

The vesting period for Carnegie Mellon's retirement plan may be reduced or waived if, within the past five years, you have received employer contributions into a 403(b) plan or have worked at another college/university. Use this form to provide documentation of your participation.

If you have received employer contributions into a 403(b) plan, please contact the plan carrier directly and provide a letter/documentation that confirms the following information about your plan. (Supporting documentation from your carrier must accompany this form.)

TIAA/CREF Regular Retirement Annuities

Contract number(s) _____	Date Opened _____	Date of Last Premium Deposit _____
_____	_____	_____
_____	_____	_____

Vanguard Custodial Account(s)

Plan number(s) _____	Date Opened _____	Date of Last Premium Deposit _____
_____	_____	_____
_____	_____	_____

Other: Carrier Name _____ Phone _____

Plan number(s) _____	Date Opened _____	Date of Last Premium Deposit _____
_____	_____	_____
_____	_____	_____

If you worked at a college/university but did not receive 403(b) contributions, obtain a letter from your previous employer (on letterhead) that includes the following information about your employment history with them:

- Your name
- Your date of hire and date of separation/termination
- Confirmation of full time employment status or a work assignment of at least 1,000 hours in each employment year (including your last/partial employment year with the employer).

PRINT NAME

Last Four Digits of SSN

SIGNATURE

DATE

Office use only _____

T/C _____

VANG _____

Effective Date _____

Vesting Date _____

Cov Code _____