

Investment Plan Retirement – Checklist

Employee Name _____ People First ID# _____

Agency/Circuit _____ Termination Date _____

Payroll

Date _____

Submitted Termination PAR* to JAC, reason code "53" for "Other" _____

Submitted Leave PAR to JAC for annual and/or sick leave payout _____

* Please indicate this is an "Investment Plan Retirement" in the Comments Section of the PAR. This will ensure the PAR is appropriately routed to the Retirement Coordinator to process.

Distribution Eligibility*

Date _____

Employee has reviewed the [Investment Plan Termination Kit](#) _____

Employee has completed the [Investment Plan Distribution Acknowledgment Form](#) _____

* Investment Plan members may request a distribution by contacting the FRS Plan Administrator at 1-866-446-9377, option 4. Members are not required to complete any paper forms to request this distribution and also have the option of rolling over the funds to another qualified retirement account or taking periodic withdrawals.

Notes: