

# Application to Purchase Service Credit

Please type or print clearly in black ink. Instructions on page 2.

■ **Important** – This form is the first step for active members who are applying to purchase service credit. KPERS will notify you of the cost based on your age and current salary (or current final average salary, if higher), and you can decide whether to purchase the service. Review the list of service types on page 2 before completing this form. For service not listed on page 2, such as out-of-state teaching, non-federal public service, Peace Corps and VISTA service, please complete an Application to Purchase Service Credit – Non-KPERS (KPERS-67PS) form instead.

■ **Contact Us** – toll free: (888) 275-5737 • phone: (785) 296-6166 • fax: (785) 296-6638  
e-mail: [kpers@kpers.org](mailto:kpers@kpers.org) • web site: [www.kpers.org](http://www.kpers.org) • mail: 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

## ■ Part A – Member Information

1. Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
2. Name (First, MI, Last): \_\_\_\_\_
3. Mailing Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_
4. Telephone Number: (\_\_\_\_) \_\_\_\_\_
5. E-mail Address: \_\_\_\_\_
6. Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_
7. Type of Purchase: \_\_\_\_\_
8. Number of Years to Be Purchased: \_\_\_\_\_
9. Method of Purchase: (choose either lump sum or payroll deduction)

### Lump Sum

- Personal Check or Money Order
- Rollover
- Trustee-to-Trustee Transfer
- Discover Card

### Payroll Deduction

- Qtr. per Qtr. (one additional quarter each quarter)
- 2 Qtrs. per Qtr. (two additional quarters each quarter)

"I understand that service credit, once purchased, cannot be revoked as long as I remain a member of the Kansas Public Employees Retirement System (KPERS). If I select a purchase by *payroll deduction*, the selection cannot be revoked and only one application can be submitted at a time. If I select a purchase by *lump sum*, the selection is void if payment is not made within 45 days of notification of the purchase cost. However, I may reapply at a later date and the cost will be based on my age and current salary (or current final average salary, if higher) at time of application."

Member Signature: \_\_\_\_\_ Month/Day/Year: \_\_\_\_/\_\_\_\_/\_\_\_\_

## ■ Part B – Employer Information – This section must be completed by the employer's designated agent.

1. Is the employee an active, contributing member? (see instructions for eligibility)  
 Yes  No; Last Date on Payroll: \_\_\_\_/\_\_\_\_/\_\_\_\_
  2. Membership Date: \_\_\_\_/\_\_\_\_/\_\_\_\_
  3. Year of Service Start Date: \_\_\_\_/\_\_\_\_/\_\_\_\_
  4. Employer During Year of Service: \_\_\_\_\_
  5. Year of Service Salary: \$ \_\_\_\_\_
  6. Annual Compensation: \$ \_\_\_\_\_  
(total compensation earned during the last 12 months or the current rate of compensation, whichever is greater)
  7. Final Average Salary: \$ \_\_\_\_\_ (to be completed by KPERS)
  8. Employer: \_\_\_\_\_
  9. Employer Number: \_\_\_\_\_
- Designated Agent Signature: \_\_\_\_\_ Month/Day/Year: \_\_\_\_/\_\_\_\_/\_\_\_\_

# Instructions for Service Credit Purchase Application

## ■ Part A – Member Information

1-6. Enter the requested personal information.

7. Indicate the type of service credit you are purchasing by listing one of these categories:

Year of Service	Forfeited Brd. of Regents Service*	Military Service* (DD214 form)
Partial Year of Service*	(TIAA or equivalents - KS Service)	Elected Official Service* (KPERS-10 form)
Forfeited KPERS Service (school and nonschool)	Forfeited KSRS Arrearage Service	Brd. of Regents Plan, Membership Waiting Period (TIAA or equivalents - KS Service)
Forfeited KP&F Service	Buy-Up 0.75 percent**	
Forfeited Judges Service	KSRS transferred to KPERS	

\* These purchases require additional verification forms. See your designated agent for more information.

\*\* Buy-Up 0.75 percent: If you purchased out-of-state teaching service, out-of-state public service or Peace Corps service *before July 1, 1998*, at the rate of 1 percent, a one-time buy-up to a rate of 1.75 percent is available. The buy-up raises the value of this service in your retirement benefit calculation and increases your retirement benefit. Under *Type of Purchase*, write “Buy-Up 0.75 percent.”

8. Indicate the number of years of service that you would like to purchase.

9. Mark the corresponding boxes to indicate the payment method for your service purchase. You may combine more than one lump-sum payment method, but you cannot combine a lump sum and a payroll-deduction method. Certain types of service can only be purchased by a lump-sum payment. Please see your designated agent or contact the Retirement System.

**Lump Sum:** KPERS will send a lump-sum *Cost Letter* to you through your designated agent. KPERS must receive a lump-sum payment within 45 days of the *Cost Letter* date or the application to purchase service credit becomes void.

**Personal Check or Money Order:** Please send your payment along with your *Cost Letter*.

**Rollover:** KPERS can accept money from an eligible retirement plan or individual retirement account (IRA), provided the money consists of pre-tax contributions and is an eligible rollover distribution. KPERS will include a Service Credit Purchase via Rollover form (KPERS-67R) with your *Cost Letter*.

**Trustee-to-Trustee Transfers:** KPERS can accept money from a 457(b) governmental plan and a 403(b) plan to purchase permissive service credit. KPERS will include a Service Credit Purchase with a Trustee-to-Trustee Transfer form (KPERS-67T) with your *Cost Letter*.

**Discover Card:** Discover Card payments can be made at the KPERS office, or contact our office for other options. Credit card payments will include an additional 2 percent surcharge.

**Payroll Deduction:** KPERS will send a payroll deduction form to you through your designated agent. This form explains the payroll deduction process in detail. You and your designated agent must sign and return the form within 21 days to complete the purchase agreement. Payroll deductions are in addition to your regular contributions.

10. Read and understand the statement. Sign and date the form.

## ■ Part B – Employer Information – This section must be completed by the employer’s designated agent.

1. Verify that the member is an active, contributing member of the Retirement System. If he or she is not active, the service purchase is not available. Members who end employment during a payroll deduction purchase may apply to purchase the remaining service by lump sum within 30 days of their last day on payroll.

2-5. Complete only if the member has selected the *Year of Service* purchase in Part A, #7.

6. Complete for any lump-sum purchase request. Annual compensation means the total compensation **earned** in the 12-month period immediately before the current month **or** the current annual rate of compensation, whichever is greater.

7. The service purchase cost will be based on the *higher* of the member’s current annual compensation or current final average salary. KPERS staff will complete this item.

8-9. Enter the employer’s (4) four-digit identification number. State agencies, enter the state agency number preceded by the capitol letter “S.” The Retirement System will accept only the designated agent’s signature on file or an authorized representative whose signature is also on file.