



School District of Philadelphia Notification of Retirement/Resignation

***Do not use this form to request a retirement estimate**

Date: _____

TO: Department of Human Resources
Retirement Office
440 North Broad Street, Suite G-8
Philadelphia, PA 19130
Phone (215) 400-4680

Fax (215) 400-4681

FROM:

Name (Please Print)

Social Security Number

Address

City, State, Zip Code

Telephone No. _____

Home

Cell

Date of Birth _____

I am:

Retiring Resigning

My last day of work is _____ / _____ / _____
(10 month Employee's Contract expires June 30th)

Check all that apply:

Currently on sick leave/ wage continuation Currently on Sabbatical

Currently on other leave (i.e. illness in family, maternity, military, etc.): _____
(Please note)

I am assigned to _____ location

My position is _____

I am a _____ permanent employee _____ substitute employee

Approximately how many years with the School District of Philadelphia _____

Please note: **Employees who are at least 55 years of age or will turn 55 in the calendar year in which they separate from service must set up a 403(b) Plan account (or 457(b) if applicable) to receive their Termination Pay. On the reverse are the five approved School District providers.**

Signature

IMPORTANT TERMINATION PAY INFORMATION

Please contact one of the approved providers listed below to open a 403(b) Plan account or a 457(b) Plan account.

You may take an immediate lump-sum cash distribution of the balance of your 403(b) and 457(b) Plan accounts, or you may roll the money into an IRA or another employer's retirement plan. This means that the amount of your Termination Pay will be available for distribution to you (usually within one week) after it is contributed to the Plans by the School District. Alternatively, you may continue to invest your account balance under the Plan(s) until a later distribution date.

The approved providers for the School District's **403(b) and 457(b) Plans** are:

- **AIG VALIC** Susan Borzillo (610) 640-6260
- **AXA Equitable** Ernest L. Repice (888) 660-4108
- **MetLife** Kimberly Butler (610) 254-9305 ext 11
- **Lincoln Investment Planning** John Gallagher (800) 242-1421 x 1230
Kelly Ochozny (800) 242-1421 x 1435
- **TIAA-CREF** Telephone enrollment (800) 842-2888
For termination pay only: Nicki McCann (800) 842-

2010

Be sure to keep copies of everything you submit.