FULTON COUNTY EMPLOYEES RETIREMENT SYSTEM



Department of Finance 141 Pryor Street SW, Suite 7001 Atlanta, GA 30303 Pension Office: 404-612-7606 Fax: 404-730-7809

RETIREMENT INFORMATION

PRIOR TO YOUR LAST DAY ON DUTY, THE PENSION OFFICE NEEDS:

- ➢ COPY OF YOUR BIRTH CERTIFICATE
- > COPY OF SPOUSE'S BIRTH CERTIFICATE AND SOCIAL SECURITY CARD
- COPY OF CHILDREN BIRTH CERTIFICATE (MINOR CHILDREN UNDER AGE 18 AND/OR COLLEGE STUDENTS UP TO AGE 25)
- ➢ COPY OF MARRIAGE CERTIFICATE
- > COPY OF YOUR MEDICARE CARD, IF APPLICABLE (DISABLED OR AGE 65 OR OVER)
- COPY OF SPOUSE'S MEDICARE CARD, IF APPLICABLE (DISABLED OR AGE 65 OR OVER)

PLEASE COMPLETE THE FOLLOWING ENCLOSED FORMS:

- ► PENSION APPLICATION
- > BENEFICIARY FORM
- DEDUCTION TO MAINTAIN IN RETIREMENT (INCLUDE DEPOSIT SLIP FOR CREDIT UNION DEDUCTIONS)
- > DIRECT DEPOSIT FORM (INCLUDE A VOID CHECK)
- ➢ W-4 TAX WITHHOLDING FORM
- HEALTH INSURANCE ENROLLMENT FORM
- ➢ LIFE INSURANCE ENROLLMENT CARD
- > COPY OF SIGNED/SAVED AFFIDAVIT

<u>PLE. VSENOTE</u>: Payout of your accrued vacation, holiday and/or comp time will not be direct deposited. You will receive a paper check. Please advise your payroll rep if you want your check mailed or if you will pick up. After you have been paid out your accrued leave balances and are off payroll, your Pension will be presented to the Pension Board for approval. The Pension Board meets the 2nd Wednesday of each month and Pension checks are paid on the 1st of each month. If the 1st falls on a weekend, checks will be paid on the previous business day.

Retiree Health Benefits Information:

As you transition from active employee to retiree, you may receive a letter from Blue Cross Blue Shield of Georgia advising you that your health benefits has expired as an active employee and that you may apply for Cobra. Since you are retiring from the county, please disregard that letter. Your retiree health benefits will be effective the month after your health benefits expire as an active employee. Also, please bear in mind that during this transition, there will be a delay in your health benefits coverage. Therefore, after you have received your final pay for your accrued leave balance of vacation, holiday and/or comp time from the county, please try to schedule your doctor's appointments after the 10th of the following month of your final pay check from the county. ER appointments will be handled on a case by case basis. If you have any questions regarding this process, please call.....

Verna Thomas at 404-612-4228



APPLICATION FOR RETIREMENT

STANDARD ... AGE PENALTY ... BENEFICIARY ... DISABILITY ... LINE OF DUTY DISABILITY

The undersigned does hereby apply for retirement benefits under the ______ Law, effective

Name	_ SS#
Address	
	_ Telephone No
Department	Last Day on Duty
Date of Birth	Date of Marriage
Employees Association (maintain membership) Yes	s No
Jame of Spouse	
Spouse Date of Birth	SS#
iwom to and subscribe before me this	
d ayof20	
Notary Public Appli	cant Signature

CERTIFICATE OF AUDITOR

For pension is ______years of age, has regularly contributed to the Pension Fund of said County pursuant to law, and that they have been in the employ of Fulton County as represented in their petition ______ years which may include prior service credit, according to Fulton County records, and that if it is satisfactorily shown to the Pension Board that the facts stated in the petition are true, then the Pension Board of Fulton county is authorized to grant to the petitioner a monthly pension in the amount of S______ per month, effective______, 20_____.

APPROVED BY:

Attorney

AUDITOR

Date:

Date: _____



FULTON COUNTY EMPLOYEES RETIREMENT SYSTEM

DEPARTMENT OF FINANCE, 141 PRVOR ST., STE 7001, SW, ATLANTA, GA 30303

BENEFICIARY FORM

NAME

SOCIAL SECURITY NO.

DEPARTMENT

DATE OF BIRTH

EMPLOYMENT DATE

BENEFICIARY STATEMENT FOR ...

SINGLE STATUS EMPLOYEES AND EMPLOYEES WITH LESS THAN TEN YEARS CREDITABLE SERVICE

In the event of my death before retirement and before becoming eligible for my beneficiaries to receive pension benefits, I direct that a lump sum payment of my contributions (or any undistributed balance thereof) be made to:

Please include name(s), address and social security numbers of Beneficiary

If there are no spouse or minor children, you can say "Executor of my Estate"...include the person(s) name and address

EMPLOYEES WITH TEN OR MORE YEARS OF CREDITABLE SERVICE

Your spouse and/or minor children under age 18 are automatically beneficiaries under the pension plan. It is the duty of each employee to notify the Pension division of any change in the status of beneficiaries, such as birth of children, death of spouse or divorce.

Name of Spouse ______ SS# _____ SS# _____

Spouse's Date of Birth _____ Date of Marriage _____

Minor Children Under Age of 18 Years:

Name	Date of Birth	Social Security #

Signature	Date
3	

Witness _____ Date _____

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FULTON COUNTY EMPLOYEES RETIREMENT SYSTEM DEPARTMENT OF FINANCE, 141 PRYOR ST., STE 7001, SW, ATLANTA, GA 30303

(ACH CREDITS) PENSION PAYROLL DEPOSIT AUTHORIZATION FORM

COMPLETE AND RETURN TO THE PENSION DIVISION <u>PLEASE INCLUDE A VOID CHECK FOR PROCESSING</u> <u>WRITE "VOID" ON CHECK</u>

BANK				_

Спту_____

RETIREE NAME _____

BANK ABA NO. _____

ACCOUNT NUMBER

I hereby authorize Fulton County Pension Board and the Bank listed to deposit my net pension pay automatically to my account each pay day. This authorization will remain in effect until I have provided written notification to cancel.

SIGNATURE

DATE

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WITHHOLDING ALLOWANCE CERTIFICATE

Street Address City, State, Zip Code	ocial Security Number SingleMarried Head of Household
City, State, Zip Code	
City, State, Zip Code	Head of Household
FEDERAL	
1. Withhold Federal Tax from my pension	
 Total number of allowances you are cl Additional amount, if any, you want de 	
STATE 1. Withhold Georgia Tax from my pension	Yes No
 Withhold Georgia Tax from my pension Total number of allowances you are cl 	aiming
	educted from your pension \$

Signature

Date



FULTON COUNTY EMPLOYEES RETIREMENT SYSTEM

DEPARTMENT OF FINANCE, 141 PRYOR ST., STE 7001, SW, ATLANTA, GA 30303

DEDUCTIONS TO MAINTAIN IN RETIREMENT

(COMPLETE AND RETURN WITH APPLICATION)

CREDIT UNION DEDUCTIONS (INCLUDE DEPOSIT SLIP FOR PROCESSING)

A) ASSOCIATED FEDERAL CREDIT UNION (CRED1)

YES		

No

AMOUNT S_____

B) EXCEL FEDERAL CREDIT UNION (CRED2)

YES		

No	

AMOUNT \$_____

C) CITY OF ATLANTA (CRED3)

YES

NO _____

AMOUNT \$_____

SIGNATURE

DATE



401A (New Plan)

CHECK YOUR RETIREMENT PLAN

(DB) Defined Benefit (Old Plan) _

2019 Retiree Annual Enrollment Form

INFORMATION ABOUT YOU						
Retiree Name (First Name, Last Nam	e):			S	ocial Security #	:
Are you age 65 or older / Medicare E	Are you age 65 or older / Medicare Eligible: Yes No					
Retiree Home Address:			(2014)			
Street:			City:			
			State:			Zip:
Home Phone:			Cell Phone:			Email:
Marital Status: C Married C Single	Widowed Divorce	ed .	Date of Hire	://_		Date Retired:
Are you eligible for Medicare?		rt A / Effective of	late:		D Part B / E	iffective date://
Is your spouse eligible for Medicare	? 🗆 Pa	rt A / Effective of	lato:/		D Part B/E	flective date:
Is your or your spouse's Medicare co	overage related to end	-stage renal d	isease? 🗆 Yes	O No		
YOUR HEALTH PLAN OPTIONS					V X	
Medical Plan Coverage Tier (Select					_	
Retiree Onty		etiree + Spouse			Retiree -	+ Child(ren)
Family		laiva Coverage		0-11	And Ann OF	
Medical Plan Options—Retirees Und SELECT ONE MEDICAL PLAN	er Age 65:			E MEDICAL	Retirees Age 65	br Ulder:
HSA Plan (Anthem BlueCross Blue	ueShield)				e Advantage Plan	°n
POS Plan (BlueCross BlueShield					dicare Advantage	
HMO Plan (Kaiser Permanente)			Medica	re Indemnity I	Plan (BlueCross I	BlueShield of Georgia)
			Medica	re HMO Plan	(BlueCross Blue	Shield of Georgia)
			D PPO P	us Plan (BCB	S of GAcurren	t participants only)
			* To enroll li	n the Basic A	etna Medicare /	Advantage Plan or the
					re Advantage Pl ectly: (800) 307-	an for the first time,
Oental Plan (SELECT ONE DENTAL	DI ANN		picase conta	act Actina Uni	ectly. (000) 301-	4030.
Comprehensive Dental PPO Plan		ental HMO Pla	n - Primary Dent	ist Office ID		(Required)
Dental Plan Coverage Tier (Select Or				-		(```
Retiree Only		etiree + Spouse	3		Retiree	+ Child(ren)
Family		aive Coverage				
Vision Plan Coverage Tier (Select Or						20 BC 4
Retiree Only		ebree + Spouse			Retiree -	+ Child(ren)
INDIVIDUALS TO BE COVERED*		laive Coverage		1		
INDIVIDUATED TO BE COVERED		1 1		Disabled.	Currently	Dependent Coverage Option
2672 ⁴		Sex	Birthdate	before	covered by	(If Retiree is enrolled in Aetna
Name (Last, First, M.I.)	Social Security#	(M or F)	(mm/dd/yyyy)	a go 19?	Medicare?	Medicare Advantage Plan)
Self				Yes	Yes	「「「「」」「」」「」」「「」」」「「」」」」」」」」」
Spouse		-		□ Yes	□ Yes	-
Child				□ Yes	□ Yes	Medicare Indemnity Plan
Child				C Yes	□ Yes	Medicare HMO Plan
Child				C Yes	□ Yes	
If any of your dependents listed above	live at an address that is			implete the fo	llowing:	
Name(s)		1	Address(es)			
* When enrolling dependents for the	e føst time, you must su	bmit with this o	nrollment form s	upporting doc	umentation approx	opriate for the relationship of the
dependent to you (e.g., marriago verification of pormanent disability		te, adoption pla	cement papers,	court-ordered	i child health cov	erage support affidavit, physician
IF YOU ARE DECLINING (OVERAGE	The second se				States and a state of the	ALL DE COMPANY OF THE OWNER
By completing this section, I acknowled	and the second se	opportunity to e	nroll for 2019 Fu	uton County h	ealth care cover	age and am choosing not to enroll in
one or more of the above benefit plans.	I understand that if my	dependents or	t wish to enroll a	a later date :	for any of the con	verage(s) I have declined,
 I here will be required to submit a new employer. 	Enroliment Form and o	overage may b	e subject to late	enrollee provi	sions, as allowed	I by law and BS directed by my
Reason for refusal: (Please check all th	at apply)	ii.	FOR OTHER CO	VERAGE		
Other group coverage sponsored by		0	Carrier:		Plan Number:	
Other group coverage sponsored by						
Other group coverage sponsored by		1	Telephone Number:			
Other reasons (Please explain belo	w)					
Retiree Signature		6	Date			

Intereby authorize a deduction to be made from my pay or drafted from my bank account on file (d applicable) as my share of the premium cost, as authorized by the Futton County Board of Commissions. I certify the above information is true and correct and I am entitled to the coverage requested. I declare that all statements and information made hereon are complete and true to the best of my knowledge. I understand that any insistatements or omissions may vaid all soverage applied for any member on this application on a retreactive basis for up to two (2) years than the contrast effective date.





RIGHTS AND OBLIGATIONS

I hereby apply for myself and my eligible family members for the coverage specified in the Contract between my Group/Employer and BlueCross and BlueShield of Georgia, Aetna Medicare Advantage PPO, Kaiser Foundation Health Plan of Georgia HMO, Aetna Health Dental PPO or HMO, or EyeMed Vision (hereinafter referred to as the Plans).

I understand and agree that the effective date of coverage will be governed by the stipulations of the Group Application and the Master Group Contract under which this application is made. I understand that membership will continue according to the terms of the contract between the employer and the Plans. I hereby authorize the employer to periodically deduct any charge due from me hereunder and to remit same to the Plans along with any contribution due from the employer.

I hereby authorize any hospital, physician, psychiatrist, psychologist, counselor, psychiatric hospital or other provider, dispenser of prescription drugs, appliances, ambulance service or any person or any institution rendering services to me or members of my family, if covered hereunder, to furnish the Plans all requested information concerning treatment, advice, psychiatric care or medical care for previous or future conditions, illnesses or disabilities.

I declare that all statements made hereon including the information provided on the front of this application are complete and true to the best of my knowledge and belief, and agree that the Plans may cancel this coverage within two (2) years from the effective date, for any ineligible family member or one on whom erroneous or false information has been submitted, personally assuming liability for reimbursement to the Plans for any benefit payment made on behalf of such family member. After this contract has been in force for a period of two (2) years during the lifetime of the insured, it shall become incontestable as to the statements in the applications. I understand that I am responsible for giving notice to my Group/Employer of any changes in my status and that of my family members that affect coverage.

ABBREVIATED NOTICE OF INSURANCE INFORMATION PRACTICES

PRIVACY ACT. Georgia state law establishes standards for the collection, use and disclosure of information gathered in connection with insurance transactions. The application attached to this notice contains specific personal questions about you and your dependents. Your answers are required to determine if you qualify for coverage. Plans are required to advise you that personal information may be collected from persons other than you or other individuals proposed for coverage. An investigative consumer report may be made to help obtain additional medical data from physicians or hospitals.

ALL DATA IS CONFIDENTIAL. Plans are required by law to keep such data confidential. It will be seen only by their employees and authorized agents. This data may in certain circumstances be disclosed without your authorization. Plans may furnish such data to authorized federal or state agencies, consumer investigative service bureaus or others if part of standard business practice or required by law.

ACCESS TO YOUR DATA. You have the right to see or obtain a photocopy of your personal information. You also have the right to send a written request if you want any of your personal information to be amended, corrected or deleted. If you wish to have a more detailed explanation of information practices, please contact the applicable carrier:

- BlueCross and BlueShield of Georgia, Customer Service Department, Post Office Box 7368, Columbus, Georgia 31908–7368
- Aetna, Inc., RT-52, 151 Farmington Avenue, Hartford, Connecticut 06156
- Kaiser Foundation Health Plan of Georgia, Nine Piedmont Center, 3495 Piedmont Road NE, Atlanta, GA 30305
- EyeMed Vision Care, 4000 Luxottica Place, Mason, OH 45040.



2018 Retiree Annual Enrollment Form

RIGHTS AND OBLIGATIONS

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I hereby authorize any hospital, physician, psychiatrist, psychologist, counselor, psychiatric hospital or other provider, dispenser of prescription drugs, appliances, ambulance service or any person or any institution rendering services to me or members of my family, if covered hereunder, to furnish the Plans all requested information concerning treatment, advice, psychiatric care or medical care for previous or future conditions, illnesses or disabilities.

I declare that all statements made hereon including the information provided on the front of this application are complete and true to the best of my knowledge and belief, and agree that the Plans may cancel this coverage within two (2) years from the effective date, for any ineligible family member or one on whom erroneous or false information has been submitted, personally assuming liability for reimbursement to the Plans for any benefit payment made on behalf of such family member. After this contract has been in force for a period of two (2) years during the lifetime of the insured, it shall become incontestable as to the statements in the applications. I understand that I am responsible for giving notice to my Group/Employer of any changes in my status and that of my family members that affect coverage.

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ALL DATA IS CONFIDENTIAL. Plans are required by law to keep such data confidential. It will be seen only by their employees and authorized agents. This data may in certain circumstances be disclosed without your authorization. Plans may furnish such data to authorized federal or state agencies, consumer investigative service bureaus or others if part of standard business practice or required by law.

ACCESS TO YOUR DATA. You have the right to see or obtain a photocopy of your personal information. You also have the right to send a written request if you want any of your personal information to be amended, corrected or deleted. If you wish to have a more detailed explanation of information practices, please contact the applicable carrier:

- BlueCross and BlueShield of Georgia, Customer Service Department, Post Office Box 7368, Columbus, Georgia 31908–7368
- Aetna, Inc., RT-52, 151 Farmington Avenue, Hartford, Connecticut 06156
- Kaiser Foundation Health Plan of Georgia, Nine Piedmont Center, 3495 Piedmont Road NE, Atlanta, GA 30305
- EyeMed Vision Care, 4000 Luxottica Place, Mason, OH 45040.

RETIREE

	Cr	Fulton County, oup Life Insurance En		· m	revised IM.
RETIREE NAME		FIRST	MIDDLE INITIAL	SEX aM	DATE OF BIRTH
Coverage Selecti	ion: Basic Life Coverage	\$10,000	No Re	liree Cost	
(Check Only O	Ine Dependent Life O	ption)			
	Dopondont Life	S10,000 per dependent	5.85 p	er moth	
	Dependent Life	Walved or Not Applicable	No Rot	tree Cest	
Eligible Dependen DEPENDENT NAM	nts: (Spouse or Child up	RELATIONSHIP	DATE OF BIRTH	L SOCIAL SEC	CURITY NUMBER
				j.	
qual shares to the	named primary beneficiari	e primary boneficiaries are ne es who survive you. If no prin , the lotal must equal 100%. (F	nary beneficiary survivas you	, proceeds will b	e paid to the contingen
RST NAME	LAST NAME	SOCIAL SECURITY#			SENEFIT
מציו					
ካደл		1			
n2901)					
ninger-l		1			

I HEREBY REDUEST TO BE INSURED AND AUTHORIZE DEDUCTIONS, IF ANY, FOR MY SHARE OF THE COST OF THE BENRITS TO WHICH I MAY BE ENTITLED UNDER THE GROUP POLICY (IES) ISSUED TO THE EMPLOYER LISTED ABOVE. FOR THOSE COVERAGES I HAVE DECLINED. I UNDERSTAND THAT IF I CHOOSE TO EXACUL AT A LATER DATE, MY COST MAY BE HIGHER AND A HEALTH QUESTIONNARIRE MAY BE REQUIRED. I UNDERSTAND THAT ANY INDIVIDUAL DEPENDENT CAN ONLY BE COVERED ONCE IN THIS GROUP LIFE INSURANCE PLAN.

Any person who knowingly and with intent to defraud any insurance company or other person files an application for insurance or a statement of claim containing any materially false information, or concests for the pupose of misteading, information concerning any fact material threeto, commits a fraudulent insurance act which is a crime and subjects such person to criminal and givil penalties. INFORMATION ON THIS FORM WILL OVERRIDE ANY PRIOR SELECTION OR DESIGNATION FOR THE POLICY (IES) LISTED ABOVE.

RETOREE SIGNATURE

DATE _____

1.

4

FULTON COUNTY GOVERNMENT COMPLIANCE WITH "SAVE" STATUTORY REQUIREMENTS

Fulton County is required to comply with the enacted State Law that requires the County's participation in Systematic Alien Verification for Entitlements ("SAVE") Program. The SAVE Program is a federal initiative designed to aid benefitgranting agencies in determining an applicant's immigration status, and thereby ensure that only entitled applicants receive federal, state or local benefits and licenses. As required by Georgia Security and Immigration Compliance Act of 2006, as amended, every agency administering or providing Public Benefits is responsible for requiring that applicants for public benefits execute a sworn affidavit verifying the employee's lawful presence in the United States.

All permanent employees and retirees receiving retirement, disability, and/or health insurance benefits are required to complete the "Affidavit Verifying Eligibility Status for Public Benefits Form". This affidavit must be executed in front of a notary and employees' must return original notarized affidavit with a copy of one (1) secure and verifiable document from the list below.

Failure to comply could result in delay or suspension of employees' benefits. If you have questions, please contact Anthony Muhammad via email anthony.muhammad@fultoncountyga.gov or call at (404) 612-7675 or (404) 612-7605.

SECURE AND VERIFIABLE DOCUMENTS

- An Unexpired United States Passport or Passport Card
- An Unexpired United States Military Identification Card
- An Unexpired Driver's License issued by the United States
- An Unexpired identification card issued by the United States
- An Unexpired Tribal Identification Card of a federally recognized Native American Tribe
- An Unexpired US Permanent Resident Card or Alien Registration Receipt Card
- An Unexpired Employment Authorization Document that contains a photograph of the bearer
- An Unexpired Merchant Mariner Document or Credential issued by U.S. Coast Guard
- An Unexpired Free and Secure Trade (FAST) Card
- An Unexpired Certificate of Citizenship issued by the United States Department of Citizenship
- An Unexpired Certificate of Naturalization issued by the United States Department of Citizenship

• An Unexpired Passport issued by a Foreign Government provided that such passport is accompanied by a United States Department of Homeland Security ("DHS") Form I-94, DHS Form I-94A, DHS Form I-94W, or other federal form specifying an individual's lawful immigration status or other proof of lawful presence under federal immigration law.

Fulton County Government Affidavit Verifying Eligibility Status for Public Benefit(s)



Pursuant to the *Georgia Security and Immigration Compliance Act* of 2006 (Senate Bill 529.GSICA), every agency administering or providing public benefits is responsible for determining U.S. citizenship or lawful alien status of applicants for said benefits. (O.C.G.A. § 50-36-1)

By executing this affidavit under oath, as an applicant for a retirement, disability, and/or health insurance benefits, the undersigned applicant verifies one of the following with respect to his/her application for a public benefit from Fulton County Government.

- 1. I am a United States citizen.
- 2. _____ I am a legal permanent resident of the United States.
- I am a qualified alien or non-immigrant under the Federal Immigration and Nationality Act with an alien number issued by the Department of Homeland Security or other federal immigration agency.

My alien number issued by the Department of Homeland Security or other federal immigration agency is:

The undersigned applicant also hereby verifies that he or she is 18 years of age or older and has provided at least one secure verifiable document listed below, as required by O.C.G.A..§ 50-36-1(e)(1), with this affidavit. The following list of secure and verifiable documents, published under the authority of O.C.G.A.§ 50-36-2, contains documents that are verifiable for identification purposes, and documents on this list may not necessarily be indicative of residency or immigration status.

- •An Unexpired United States Passport or Passport Card
- An Unexpired United States Military Identification Card
- An Unexpired Driver's License issued by the United States
- An Unexpired identification card issued by the United States
- An Unexpired Tribal Identification Card of a federally recognized Native American Tribe
- An Unexpired US Permanent Resident Card or Alien Registration Receipt Card
- · An Unexpired Employment Authorization Document that contains a photograph of the bearer
- An Unexpired Merchant Mariner Document or Credential issued by U.S. Coast Guard
- An Unexpired Free and Secure Trade (FAST) Card
- An Unexpired Certificate of Citizenship issued by the United States Department of Citizenship
- An Unexpired Certificate of Naturalization issued by the United States Department of Citizenship
- An Unexpired Passport issued by a Foreign Government provided that such passport is accompanied by a United States Department of Homeland Security ("DHS") Form I-94, DHS Form I-94A, DHS Form I-94W, or other federal form specifying an individual's lawful immigration status or other proof of lawful presence under federal immigration law.

The secure and verifiable document provided with this affidavit can best be classified as: (list document and provide a copy) ______

In making the above representation under oath, I understand that any person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall be guilty of a violation of O.C.G.A. § 16-10-20 and face criminal penalties as allowed by such criminal statute.

Executed in _____ (city), _____ (state)

Signature of Applicant

Printed Name of Applicant

Subscribed and sworn before me on this the

_____ day of ______, 20_____,

Notary public: _____

My commission expires: ______