



Member Transfer Form

This form is for any eligible Plan 2 member who wants to initiate a transfer from Plan 2 to Plan 3. The transfer option is only available in **January**.

Give completed form to your employer.

Need help? Contact DRS.
800.547.6657 or 360.664.7000 • TTY: 711
www.drs.wa.gov

Personal Information

Retirement System			
<input type="checkbox"/> Public Employees' Retirement System (PERS) <input type="checkbox"/> Teachers' Retirement System (TRS) <input type="checkbox"/> School Employees' Retirement System (SERS)			
Name (Last, First, Middle)		Maiden Name	Social Security Number
Mailing Address			
City	State	ZIP	Phone Number

Contribution Rate and Investment Program Selection

<p>Choose an income contribution rate. If you do not choose an option, your default will be Option A. Once established by selection or default, you may change your rate option only with a change of employer or through the purchase of optional service credit from work as a substitute teacher.</p>	<input type="checkbox"/> Option A	All ages	5.0%
	<input type="checkbox"/> Option B	Up to age 35 Ages 35 to 44 Ages 45 and older	5.0% 6.0% 7.5%
	<input type="checkbox"/> Option C	Up to age 35 Ages 35 to 44 Ages 45 and older	6.0% 7.5% 8.5%
	<input type="checkbox"/> Option D	All ages	7.0%
	<input type="checkbox"/> Option E	All ages	10.0%
	<input type="checkbox"/> Option F	All ages	15.0%

Choose an investment program. If you do not choose an investment program, you will be defaulted into the Self-Directed Investment Program and your contributions will be invested in the Retirement Strategy Fund that assumes you'll retire at age 65. You can change your investment program at any time. Get more information about both investment programs at drs.wa.gov/Plan3 or contact Empower Retirement at 888-327-5596.

Washington State Investment Board (WSIB) Investment Program

Self-Directed Investment Program
You must choose how your contributions will be invested. You may do so online at drs.wa.gov/login or by phone at 888-327-5596. If you do not choose your investment allocations, your contributions will be invested in the Retirement Strategy Fund that assumes you'll retire at age 65.

Signature Required

This form must be signed between Jan. 1 and Jan. 31. Sign and date this form on the day you submit it to your employer.

- I have chosen to transfer from Plan 2 to Plan 3. I understand that my selection of Plan 3 is permanent.
- I also understand that transferring Plan 3 members who do not select a contribution rate will be assigned the current default rate of 5%.

Signature	Date
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Give completed form to your employer.

Employers: Use Plan Choice code 3X on January or February transmittal. Send form to:
Department of Retirement Systems; PO Box 48380; Olympia, WA 98504-8380

Your Social Security number is needed so DRS can report to the IRS any funds paid to you. DRS will not disclose your Social Security number unless required to do so by law. (See IRC sections 6041(a) and 6109.)

