

Brandeis University provides retirement plan contributions to certain eligible employees following completion of a one-year service period along with meeting the requirements of the plan.

To be eligible for immediate enrollment in the Brandeis University 403(b) Basic matching retirement savings plan, the service period may be satisfied by a year of service at another accredited college or university. This service requirement is waived for employees who were employed for at least one year in a half-time or more position at a 501(c)3 higher education institution immediately preceding the date of employment at Brandeis (up to three months lapse in time between prior employment and Brandeis employment is allowed).

Brandeis Employee Section

After completing this section, the Brandeis Employee should forward this entire form to their Prior employer for completion. Once completed, it should be returned via email, fax or mail.

Employee Name: _____ Social Security Number (last four digits) _____

or Brandeis ID: _____

Campus Address: _____ Date of Hire: _____

Employee Signature: _____ Date: _____

Prior Employer Section

Your former employee, as noted above, has recently become an employee of Brandeis University. In order to determine their eligibility for our retirement plan, please provide the following benefits information:

Prior Employer Name: _____

Prior Employer Address: _____

Full-time: _____ Part time: _____ Number of hours: _____ Benefits Eligible: Yes No

Position title: _____

Hire Date for this position: _____ Termination date for this position: _____

Does your organization satisfy the requirements of code section 501(c)(3)? Yes No

Was the above-named employee eligible to participate in your institution's retirement savings plan? Yes No

If not, why? _____

Name of Person completing this form: _____

Title: _____

Phone Number: _____ Email: _____

Signature: _____ Date: _____

Please return completed form to: humanresources@Brandeis.edu

Brandeis University, Office Of Human Resources Fax to: 781-736-4466
Benefits Section
PO Box 549110
Waltham, MA 02454-9110