



State of Tennessee Optional Retirement Program



Verification of Eligibility for Exception to Lifetime Distribution Requirement

For Terminated Participants With Less Than \$15,000 in the Program Calendar Year 2018

Instructions — If you have totally and permanently separated from service with The State of Tennessee and have less than \$15,000 in the Tennessee Optional Retirement Program, you qualify for an exception to the program's lifetime distribution requirement.

Part I — To Be Completed by Participant

I have separated from service with the State of Tennessee. I have received my final paycheck and do not expect to be reemployed with an institution covered by Tennessee's Optional Retirement Program in the upcoming school year.

Participant's Name

Participant's Social Security Number

Participant's Signature

Date

Part II — To Be Completed by UT Retirement Office or Payroll Officer of TBR Institution

This participant was employed by the University of Tennessee. Our records indicate that this participant has an aggregate total balance of \$_____*

This participant was employed by the Tennessee Board of Regents. Our institution's contribution records and the participant's current quarterly statements indicate the following:

Table with 3 columns: Category, Total ORP Contributions, Account Balance. Rows include VOY, TIAA, VALIC, and TOTAL.

Date Participant's Final Paycheck Was Issued

Today's Date

Signature

Name

Title

Institution

* Do not complete this form if Total amount exceeds \$15,000.