

SAMPLE LETTER

January Plan Transfer Option for Eligible Plan 2 Member

I, _____, understand the following:

I am a Plan 2 member who has the option to transfer to Plan 3 during the open enrollment period which occurs January 1 through January 31 each year.

I am currently a member of:

PERS Plan 2

TRS Plan 2

SERS Plan 2

I have the following options:

- **Remain in Plan 2** – No action needed, as I am already a Plan 2 member.
- **Transfer to Plan 3 in January** – In January of each year, if I want to become a Plan 3 member, I must complete, sign and submit the *Member Information Form* to my employer by January 31.

The decision to transfer to Plan 3 is irrevocable and once I transfer, I will not be able to transfer back to Plan 2 at a later date.

I know that I can find more detailed information on the Washington State Department of Retirement Systems website at www.drs.wa.gov.

I certify that I have been informed of my January Plan Transfer option.

Signature of Employee

Date