



Member Transfer Form

Washington State Department of Retirement Systems

This form is for eligible Plan 2 members who want to make a permanent transfer to Plan 3. The transfer option is only available in January. To be eligible, you must be an active Plan 2 member who enrolled before Plan 3 was created and meet the service dates below:

- PERS 2: State or higher education service began before March 1, 2002, or local government service began before Sept. 1, 2002
- TRS 2: Service began before July 1, 2007
- SERS 2: Membership established before July 1, 2007 (or before August 1, 2009 if you have past PERS 2 service)

To transfer from Plan 2 to Plan 3, submit this completed form to your employer in **January**. DRS will move your Plan 2 contributions and earned interest to a Plan 3 investment account..

System and Personal Information

System

PERS Public Employees' Retirement System

TRS Teachers' Retirement System

SERS School Employees' Retirement System

Name (Last, First, Middle)

Maiden Name (If Applicable)

Your Social Security number is required for DRS to report payments to the IRS, as required by IRC sections 6041(a) and 6109.

Social Security Number

Mailing Address (Include Apt. No.)

City

State

ZIP

Phone Number



Contribution Rate and Investment Selection

Plan 3 contribution rate

The percentage of your pay that will go toward your retirement account. If you don't choose, your default rate will be Option A. You can only change your rate when you change employers. Options B and C are age-based.

Option and contribution rate

Option A	5.0%		
Option B	5.0% up to age 35;	6.0% age 35 to 44;	7.5% age 45 and older
Option C	6.0% up to age 35;	7.5% age 35 to 44;	8.5% age 45 and older
Option D	7.0%		
Option E	10.0%		
Option F	15.0%		

Plan 3 investment

Choose one. You can change your investment selections at any time.

Use the target date fund for my age (SELF Program)

This option places you in the target date fund that assumes you'll begin withdrawing funds at age 65. Valued daily, target date funds can take 1-31 days to transfer or withdraw.

I will choose my own investments (SELF Program)

Once you submit this form and receive a letter that confirms your plan choice, visit drs.wa.gov/login to choose your investments (or call 888-327-5596). If you do not choose investments, your contributions will be invested in the target date fund that assumes you'll begin withdrawing funds at age 65.

Washington State Investment Board TAP (WSIB Program)

This fund is not adjusted based on your age, but is managed in the same way the state pension fund is invested. Valued monthly, the TAP fund can take 45-90 days to transfer or withdraw.

Member 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 my plan selection is permanent.
- If I did not select a contribution rate, I will be assigned the default rate of 5%.

Member Signature

Date (mm/dd/yyyy)

Give the completed form to your employer.

Employers:

Use Plan Choice code 3X on January or February transmittal. Load completed form to the Upload Documents section of ERA. OR mail to: Department of Retirement Systems; PO Box 48380; Olympia, WA 98504-8380

Questions? Contact DRS

Call: 800-547-6657 or 360-664-7000 (TTY 711)

Visit: drs.wa.gov