



Middlebury



Dear Employer:

\_\_\_\_\_ has recently accepted a position with Middlebury College. Under certain circumstances new employees are given credit towards the waiting period for a higher level of employer contributions in our retirement plan. To determine eligibility for the accelerated benefit level we need to know certain information about this employee’s participation in your organization’s retirement plan. Please take a moment to answer the questions below and to return the information to us. **Please note, this form must be completed and returned within 60 days of the employee’s date of hire with Middlebury College.** Credit, if eligible, will be applied prospectively. If you have questions or need additional information, please contact us at [benefits@gmhec.org](mailto:benefits@gmhec.org) or 802-443-5485. Thank you for your assistance.

Sincerely,  
The Benefits Team  
Green Mountain Higher Education Consortium

**Previous Retirement Plan Confirmation**

1. What date did the employee terminate employment with your organization?
2. How many years did the employee work *at least 1,000 hours* with your organization?
  - No years
  - One year
  - Two or more years
3. Did the employee participate in a 401(a), 401(k), or 403(b) plan with your organization?
  - No.
  - Yes. Plan Type: \_\_\_\_\_ Date Last Participating: \_\_\_\_\_
4. If you answered “Yes” in #3, above, what *percent of compensation* did the employee receive as an *employer contribution* into your company’s retirement plan?      %

**Form Completed By:**

Name & Title	Date
Employer Name	Phone Number

**Please email the completed form directly to [Benefits@gmhec.org](mailto:Benefits@gmhec.org)**

<i>For Benefits Use Only:</i>	Date Form Received:	Authorized by:	Date Form Processed:
Person Number:	Date of Hire:	TDX ticket number:	Ret. Seniority Date:
Qualified for accelerated level: <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If no, reason:</i>			
Effective Date:	Age as of Effective Date:	Level as of Effective Date:	
Processes Completed: <input type="checkbox"/> RSD <input type="checkbox"/> ULE <input type="checkbox"/> Validated Level Change <input type="checkbox"/> Added to Payroll Tracker <input type="checkbox"/> PPF <input type="checkbox"/> Emailed Employee			
Notes:			