



Prior Service Credit Form

(To be used to determine eligibility for the Wake Forest University Retirement Plan)

In order to determine if you are immediately eligible for the employer contributions, please complete all sections.

EMPLOYEE INFORMATION					
Last Name:		First Name:		WFU ID #:	
Department:		Date of Hire:		Contact #:	
Pay Cycle: Monthly or Biweekly		As of today, are you 21 years or older?			

WFU EMPLOYMENT QUESTIONNAIRE	Yes	No
Were you ever employed at WFU Health Sciences or WFU School of Medicine?	<input type="checkbox"/>	<input type="checkbox"/>
Were you ever employed at Reynolda House Museum of American Art?	<input type="checkbox"/>	<input type="checkbox"/>
Were you ever employed at WFU Reynolda Campus as a Student, Temp, Staff, or Faculty?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered "Yes" to any of the above questions, please list your approximate dates of employment below.

--

NON-WFU EMPLOYMENT QUESTIONNAIRE	Yes	No
Immediately preceding your employment at WFU, were you employed for 2 years, at a higher education institution and worked at least 1,000 hours per year?	<input type="checkbox"/>	<input type="checkbox"/>
Immediately preceding your employment at WFU, were you employed for 2 years at a non-profit research organization and worked at least 1,000 hours per year?	<input type="checkbox"/>	<input type="checkbox"/>
Immediately preceding your employment at Reynolda House Museum of America Art , were you employed for 2 years at a Museum? (This only applies to Reynolda House.)	<input type="checkbox"/>	<input type="checkbox"/>

If you answered "Yes" to any of the above questions, please complete the below chart below.

Institution/Org. Name	Location	HR Phone #	Start Date	End Date

Please note that there are IRS annual limits for both employer and employee contributions each calendar year. If you have questions about your annual limit, you may contact Human Resources at 336-758-4700.

AUTHORIZATION			
I authorize Wake Forest University or Reynolda House to verify my previous employment for retirement eligibility purposes. I understand that if a verification of employment cannot be easily obtained by Human Resources, I will be responsible for providing a written verification of employment.			
Employee Signature:		Date:	

Human Resources Use Only			
Is the employee eligible for Prior Service Credit?		Eligibility letter was sent on:	Seniority Date is:
Contribution begin date is:		Approver Initials & Date:	Over 21 yrs old?