



# School District of Philadelphia Notification of Retirement/Resignation

**\*\*Do not use this form to request a retirement estimate\*\***

Date: \_\_\_\_\_

TO: Retirement Office  
440 North Broad Street, Suite G-8  
Philadelphia, PA 19130  
Phone (215) 400-4680  
Fax (215) 400-4681

FROM: \_\_\_\_\_  
Name (Please Print) 00000-  
Employee Identification Number

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip Code

Telephone No. \_\_\_\_\_  
Home Cell

Date of Birth \_\_\_\_\_

I am:

Retiring  Resigning

My last day of work is \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
(10 month Employee's Contract expires June 30<sup>th</sup>)

Check all that apply (if applicable):

Currently on sick leave/ wage continuation  Currently on Sabbatical

Currently on other leave (i.e. illness in family, maternity, military, etc.): \_\_\_\_\_  
(Please note)

I am assigned to \_\_\_\_\_ location.

My position is \_\_\_\_\_.

I am a \_\_\_\_\_ permanent employee \_\_\_\_\_ substitute employee.

Approximately how many years with the School District of Philadelphia \_\_\_\_\_

**Please note: Employees who are at least 55 years of age or will turn 55 in the calendar year in which they separate from service must set up a 403(b) Plan account (or 457(b) if applicable) to receive their Termination Pay. On the reverse are the five approved School District providers.**

\_\_\_\_\_  
Signature

## **IMPORTANT TERMINATION PAY INFORMATION**

You must contact one of the approved providers listed below to open a 403(b) Plan account or a 457(b) Plan account.

**Once the vendor of your choice receives your Termination Pay, you may then immediately take a lump-sum cash distribution of the balance of your 403(b) and 457(b) Plan accounts or you may roll the money into an IRA or another employer's retirement plan.** This means that the amount of your Termination Pay will be available for distribution to you (usually within one to two weeks) after it is contributed to the Plans by the School District. Alternatively, you may continue to invest your account balance under the Plan(s) until a later distribution date.

The approved providers for the School District's **403(b) and 457(b) Plans** are:

- AXA Equitable Ernest L. Repice (888) 660-4108
- Lincoln Investment Planning John Gallagher (800) 242-1421 x 1230  
Kelly Ochotny (800) 242-1421 x 1435
- MetLife Tony Singer (800) 492-2505 x16
- TIAA-CREF Nicci McCann (267) 675-8129
- VALIC Elizabeth Gehl (877) 889-1589

**Be sure to keep copies of everything you submit.**