

State of SC Employees Intake Form

Participant Name: _____

Alternate Payee Name: _____

Name of State agency where Participant employed: _____

Date of Hire: _____

Date of Retirement (if retired): _____ Date of Termination: _____

1. Pension Plan (Defined Benefit Plan):

- Check all that apply:
 - _____ South Carolina Retirement System (SCRS)
 - _____ Police Officers Retirement System (PORS)
 - _____ General Assembly Retirement System (GARS)
 - _____ Judges and Solicitors Retirement System (JSRS)
 - TERI Program Participant? _____ What date did you start TERI? _____
 - If retired, was Former Spouse listed as Survivor Beneficiary at retirement? _____
 - If so, which Option (B or C)? _____
 - List all beneficiaries: _____
 - Did you purchase service credit? (yes or no) _____ Explain: _____
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2. State Optional Retirement Plan (ORP) (Defined Contribution Plan):

- retirement benefit = balance in your State ORP upon retirement. Payment options: lump-sum distribution, periodic withdrawals, monthly annuity
 - Which Service Provider Manages your Plan?
 - _____ Mass Mutual | www.massmutual.com/scorp | 800.743.5274
 - _____ Met Life Resources | www.metlife.com/scorp | 800.543.2520
 - _____ TIAA | www.tiaa.org/scorp | 800.842.2252
 - _____ AIG Retirement Services (formerly VALIC)
<https://scstateorp.valic.com> | 800.448.2542
 - Please identify any and all beneficiaries for this Plan:
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3. SC Deferred Compensation Program (401K and 457 Plans):

- Please provide a statement for each Plan
 - Please identify any and all beneficiaries for this Plan:
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For more information on what Plans you participate in:

- Contact your human resources office.
- Go to **www.peba.sc.gov** or contact PEBA by phone at 803.737.6800 or 888.260.9430.
- Visit PEBA, with or without an appointment, at 202 Arbor Lake Drive, Columbia, SC 29223.
- **Member Access** is PEBA's online portal that allows SCRS members to manage their retirement account. It's safe, secure and available anytime from anywhere you have internet access. If you haven't registered for Member Access, you may do so by selecting the **Member Access** button at **www.peba.sc.gov**. From there, select Register Now to start the process.