

## Request for an updated invoice for a prior service purchase

### INSTRUCTIONS TO APPLICANT

If you previously applied to purchase creditable service and received an invoice, but then decided to postpone purchasing your service until a later date, you may still be eligible to purchase your service, but at an increased cost due to interest charges. If you are currently a member of the MTRS who is either active, or inactive on an authorized leave of absence, and you wish to purchase any previously invoiced service, **please complete sections 1 and 2** of this application and submit it to either our main or Western Regional office (address above).

If you have already paid for your service purchase, it is not necessary to complete this application. Instead contact the MTRS directly for any required information you may need regarding a previously completed service purchase.

### SECTION 1

#### APPLICANT DATA

- a) Name of applicant . . . . .
- b) MTRS member number, if known. . . . .  ☐ Not known
- c) Social Security number. . . . . XXX-XX-XXXX
- d) Mailing address . . . . . Number and street   
City  State  ZIP
- e) Phone number . . . . .  ☐ Home ☐ Cell ☐ Work
- f) E-mail . . . . .

### SECTION 2

#### SERVICE INFORMATION AND SIGNATURE

a) What type(s) of service have you previously applied to purchase for which you would like an updated invoice?

- ☐ Prior refunded service with a MA contributory retirement system
- ☐ Substitute, temporary, or part-time public school service in MA
- ☐ Other MA public service
- ☐ Out-of-state public school teaching service
- ☐ Nonpublic school teaching service in a MA publicly-funded school
- ☐ Nonpublic private school teaching service before 1973
- ☐ Overseas dependent school teaching service
- ☐ Peace Corps service
- ☐ Active military service in the U.S. armed forces, MA National Guard or Active Reserves

**Please note:** You may be required to submit additional documentation—or submit a new service purchase application—in order to receive an updated invoice. The MTRS will contact you if additional information is required.

**If you have a copy of your original invoice(s), please submit it with this form.**

I, the above-named member of the Massachusetts Teachers' Retirement System (MTRS), hereby request to receive an updated invoice for my above-noted service purchase with the MTRS. I understand that if I wish to purchase this service, I must pay the total amount due before my date of retirement.

Signature  Date

**For our processing purposes, please answer the following questions:**

**Are you also applying to purchase any other service credit?** . . . . . ☐ No ☐ Yes

**When do you plan to retire?** . . . . . ☐ 1-6 mos. ☐ 7-12 mos. ☐ 1-2 years ☐ 2+ years