

## NYSUT ERS Consultants

NYSUT ERS Consultants help NYSUT members who belong to the NYS & Local Employees' Retirement System (ERS) navigate the system. Consultants also provide forms and assist members in contacting the ERS.

Have questions?

Call or email one of our consultants:

Trudi Davis  
914-592-4411

[Trudi.Davis@nysut.org](mailto:Trudi.Davis@nysut.org)

Patti Lennon  
516-496-2035, ext. 324  
[Patti.Lennon@nysut.org](mailto:Patti.Lennon@nysut.org)

## NYSUT ERS Consultants:

- Provide general information about the ERS benefits and plans
- Serve as a contact between the member and the ERS where appropriate
- Assist individual members in framing questions that need to be asked when contacting the ERS
- Provide informational ERS pamphlets about the many plans, tiers and benefits
- Review and explain your annual ERS statement
- Assist in filling out ERS forms

NYSUT ERS Consultants do not provide financial calculations nor make recommendations about a person's decision regarding retirement benefits or the decision to retire. NYSUT recommends you make an appointment with a NYS ERS representative before retiring.  
Call 1-866-805-0990  
[www.ocs.state.ny.us/retire](http://www.ocs.state.ny.us/retire)

[NYRetirementNews.com](http://NYRetirementNews.com)

[Twitter.com/NYSLRS](https://twitter.com/NYSLRS)

[YouTube.com/user/nyslrs](https://www.youtube.com/user/nyslrs)

[Facebook.com/NYSLR](https://www.facebook.com/NYSLR)



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in education, human services and health care.

[www.nysut.org](http://www.nysut.org)



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# ERS Consultant Program

It's never too  
early to start  
planning  
for your  
retirement!

# START NOW!



SRP Food  
Service Worker  
Debra Nodzo  
at HW Smith  
Elementary  
School in  
Syracuse.



Voorheesville School District bus driver Tom Krajewski

## Who is covered by the ERS?

The New York State and Local Employees' Retirement System covers School-Related Professionals,\* municipal health care workers and other municipal employees who work in school districts or public institutions in New York State outside of New York City. This includes teaching staff in 4201 Schools.

**Full-time** school employees are required to join the retirement system.

**Part-time** workers have the option to join and are encouraged to do so.

Whether full-time or part-time, you must fill out an ERS application in order to be eligible to receive a pension.

School-Related Professionals include teacher aides and monitors, clerical titles, food service, custodial, maintenance, transportation and health care workers and other support staff titles.

\*Teaching assistants are in the NYS Teachers' Retirement System (TRS)  
**[www.nystrs.org](http://www.nystrs.org)**

## ERS workshops for your members

NYSUT encourages SRP locals to keep members up to date with the retirement system's benefits and information. Bringing members together for an ERS informational workshop is a great way to receive the tools needed to begin planning for retirement. It is your future! Start planning now!

NYSUT can help. If you are a local president or chapter leader from one of the following regions, contact the appropriate consultant below to schedule a workshop date:

**Tarrytown region:** Trudi Davis at 914-592-4411, [Trudi.Davis@nysut.org](mailto:Trudi.Davis@nysut.org)

**Nassau & Suffolk regions:** Patti Lennon at 516-496-2035 ext. 324, [Patti.Lennon@nysut.org](mailto:Patti.Lennon@nysut.org)

**All other regions:** Contact your regional staff director or labor relations specialist.



## ERS quick tips

The date you join the retirement system determines your tier:

- **Tier 1:** Before July 1, 1973
- **Tier 2:** July 1, 1973 – July 26, 1976
- **Tier 3:** July 27, 1976 – Aug. 31, 1983
- **Tier 4:** Sept 1, 1983 – Dec. 31, 2009
- **Tier 5:** Jan 1, 2010 – March 31, 2012
- **Tier 6:** April 1, 2012 –

SAVE your annual ERS statements!  
All members of the ERS receive a statement in June explaining their tier and benefits. If you don't receive one, check with your district business office to be sure you are a member.  
If not, JOIN NOW!!

### Notify the ERS

Be sure to notify the ERS of a change of address, name or beneficiary.

### Learn more about:

Timetables, contributions, service credit, COLA, final average salary, vesting, disability retirement, beneficiaries and retirement options

### Contact:

The NYS & Local Employees' Retirement System:  
1-866-805-0990  
**[www.osc.state.ny.us/retire](http://www.osc.state.ny.us/retire)**