



Burlington Employees' Retirement System – Retirement Application for Benefits

You're ready to apply for your pension plan benefits!



The Participant Service Center looks forward to assisting you throughout the process.

Simply follow the steps below:

Step 1: Request your retirement package

Log in through the plan participant login link on www.PensionEdge.com and click the **Retirement Request** option. Complete the questions and click the green **Request** button to begin the process. For website assistance, or to have your retirement request submitted on your behalf, contact the Participant Service Center using the information provided below.

Note: Your pension benefit commencement date is typically the 1st of the month and payable as of the 15th of the month. If you are receiving a refund of contributions, payment will be distributed approximately two months following the date of calculation.

Step 2: What happens next?

Please allow 60 days from your Retirement Request to actual payment of your retirement benefit.

You can expect to receive your Retirement Application for Benefits package within **two to three weeks from the time your final information is received from the City of Burlington**. Once your Retirement Request is submitted, the application process begins:

- USICG/H&H requests your final information (i.e., last day of pay, earnings, contributions, etc.) from the City of Burlington. Note your final earnings and contributions are available no earlier than your last day of pay.
- Once the City of Burlington has finalized your data, it will be made available to USICG/H&H to begin calculation of your benefit options.
- USICG/H&H will review your benefit option calculations and election package, ensuring it is accurate and complete, before it is mailed to your home address.

Step 3: Things you can do while waiting for your package to arrive

You must return certain required documents with your completed Retirement Application for Benefits package. Assembling these documents now can save you time later:

- Ensure your home address on file with the City and USICG/H&H is up to date.
- Obtain copies of the following documents:
 - Your Driver's License, Birth Certificate, or Passport
 - Your beneficiary Driver's License, Birth Certificate, or Passport
 - Your Marriage Certificate (must be a Town issued certificate, not a church certificate).
- If you plan to elect direct deposit of your benefit into your bank account, you will need to provide a voided check, preprinted bank deposit slip, or a bank letter to authenticate your bank account.
- Be aware that signoff on certain forms in your benefit application must be witnessed by a Notary Public. You may wish to see if your bank or Town offers this service so you are prepared when your documents arrive.

The Participant Service Center is ready to assist you!

Call 1.866.495.3548, Monday – Friday from 8:30 am – 4:30 pm ET

Or, send an email to ServiceCenter@PensionEdge.com with "Burlington" in the email subject line