



BENEFITS DIVISION

Waiver of Service Period for LTD and Basic Retirement Plan Participation

Employees who are at least 24 years old and have at least one year of benefits eligible service at Northwestern University are eligible to participate in the Long Term Disability (LTD) insurance and Basic (Matched) Retirement plans.

You can waive the LTD one year service period if you are at least age 24 and submit this completed form to the Benefits Division confirming that immediately prior to your hire date at NU, you were covered by an employer sponsored LTD plan for the previous year.

You can also waive the retirement plan one year service period if you are at least age 24 and submit this completed form confirming that you were benefits eligible for at least one year at a tax-exempt or governmental employer immediately prior (within 31 days) to NU employment.

Employee Name (please print): _____

Social Security Number: _____ Date of Birth ____ / ____ / ____

Employee Address: _____

Employee Fax: _____

To be completed by previous employer:

1) Dates of LTD insurance coverage for the person named above:

From _____ to _____

2) Dates of benefits eligible employment for the person named above:

From _____ to _____

3) Are you a tax-exempt organization or a governmental employer? ____ YES ____ NO

Please print or type:

Name of person completing this form: _____

Title: _____ Phone: _____

Name of employer: _____

Signature: _____

If there are any questions regarding this form, please call the Northwestern University Benefits Division at (847) 491-7513.
Please return form directly to the employee. FAX 847 467-2288.