



**PHASED RETIREMENT APPLICATION AND AGREEMENT**  
**(Attach Written Proposal for Phased Retirement to Application)**

Faculty

Staff

Name \_\_\_\_\_ Phone # \_\_\_\_\_

PSU ID# \_\_\_\_\_ Date of Birth \_\_\_\_\_

Department \_\_\_\_\_ Date of Hire \_\_\_\_\_

Retirement Plan: SERS \_\_\_\_\_ TIAA CREF \_\_\_\_\_

**Complete After Written Proposal Approved by Department Head/Manager**

Start date of Phased Retirement \_\_\_\_\_

Length of Phased Retirement \_\_\_\_\_ years (minimum of 12 months - maximum of 3 years)

Percentage of time to be worked during Phased Retirement years:

First Year \_\_\_\_\_ Second Year \_\_\_\_\_ Third Year \_\_\_\_\_

Retirement commencement date: \_\_\_\_\_

**Applicant: I have reviewed Policy HR-29 Voluntary Phased Retirement and understand and agree to the provisions of the policy. Agreement to participate in the Voluntary Phased Retirement program is irrevocable and may not be rescinded at a future date. Full retirement will commence at the agreed upon date that designates the end of the Phased Retirement period.**

Signature \_\_\_\_\_ Date: \_\_\_\_\_

Dept. Head/Manager \_\_\_\_\_ Date \_\_\_\_\_

Dean/Administrative Officer \_\_\_\_\_ Date \_\_\_\_\_

Reviewed by:  
Vice Provost/AVP of Human Resources \_\_\_\_\_ Date \_\_\_\_\_

**FOR OFFICE OF HUMAN RESOURCES USE ONLY:**

Signature \_\_\_\_\_ Date \_\_\_\_\_