



BART Retirement Plans

457(b) Deferred Compensation Plan and
401(a) Money Purchase Pension Plan

BART Purchase of Service Credit Process Made Simple!

Here are a few steps to help you through the process ...

- Step 1:** Obtain the documentation from CalPERS that certifies the transfer amount requested (Certification Form).
- Step 2:** Complete the BART 457(b)/401(a) Participant Request To Purchase Service Credit Form.
- This form is available online: bartipc.org.
- Step 3:** Submit the CalPERS documents and the completed BART 457(b)/401(a) Participant Request To Purchase Service Credit Form to the BART Benefits department for review and approval signature.
- The Benefits department will return the signed forms along with the CalPERS forms to you for submission to MissionSquare.
- Step 4:** Submit your completed 457(b)/401(a) Participant Request To Purchase Service Credit Form and Certification Form via mail, fax, or secure message (online).
- See the form for detailed submission instructions.
- Step 5:** Once MissionSquare has reviewed and processed your paperwork, they will mail your signed Certification Form and CalPERS documents and check for the approved service credit amount.
- The corresponding amount is deducted from your BART 457(b) and/or 401(a) plan account(s) per your instructions.
- Step 6:** Now you are ready to submit your Certification Form and check directly to CalPERS.



For questions, contact your MissionSquare Retirement Plans Specialist at BARTretirement@missionsquare.com or scan the QR code to schedule an appointment.



Ryan Bertrand
Retirement Plans Specialist
(202) 759-7187



Liam Ehlers
Retirement Plans Specialist
(202) 759-7277



Ray Ortiz
Retirement Plans Specialist
(202) 759-7126