



**SOUTHBRIDGE RETIREMENT BOARD**  
**41 Elm Street**  
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**Members**

Julie A. Pena, Elected  
James W. Philbrook, Elected  
Karen S. Harnois, Ex Officio  
Melinda R. Ernst-Fournier, Appointed  
Bonnie B. Losavio, Fifth Member

**Kristin LaPlante, Administrator**

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**MEMORANDUM**

**TO: New Southbridge Retirement System Member**

**FROM: Kristin LaPlante, Retirement Administrator**

**RE: Application Requirements**

Congratulations on your employment with one of our member units! Perhaps you are not already aware that municipal employees do not contribute to the federal social security program and our defined benefit program is what you will be eligible for when you reach retirement age. That is why it is imperative that you complete the attached forms so that your funds are properly protected should something happen to you prior to retirement or withdrawal from the system.

Along with the completed applications we need a copy of your birth certificate and a copy of the birth certificate for each beneficiary you name. Please be sure to have someone witness your beneficiary selection.

Attached you will find the following forms for enrollment into the Southbridge Retirement System:

1. New Member Enrollment Form – Review and complete this form being sure to include the date and your signature. Attach a copy of your birth certificate.
2. Beneficiary Selection Form – Please thoroughly review this document. Provide the requested information for your beneficiary/beneficiaries. Make sure to have your signature witnessed in the appropriate places and attach a copy of the birth certificate for each beneficiary
3. Statement Concerning Your Employment in a Job Not Covered by Social Security – Please be sure to date and sign this form.

Should you have any questions or concerns, please do not hesitate to contact the office.