

# Independent Transfer Instructions

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9705 Patuxent Woods Drive, MD 21046 USA  
Phone: (443) 391-7113 Fax: (443) 259-4884 E-Mail:  
independenttransfer@nadadventist.org

## Diagram of New Process

**Visit [www.nadsecretariat.org](http://www.nadsecretariat.org) and go to Initiatives/Services**

**The employer is to explain denominational policies on the service record and the retirement benefit expectations of the individual should he/she proceed with the transfer, and the entitlements or loss of same arising out of such transfers.**



**Visits website, Opens, reads and Submits the ITR Letter**

**(ITR) opens the independent transfer letter and reads the document information and signs the document and submits it electronically by clicking on the submit button.**



**New Link -> Form (S-251) -> is sent to the Employee/ITR**

**A new link to form (S-251) will be automatically generated and sent to the employee. The electronic form will need to be filled out by the employee. He/She can attach/upload any additional documents. Once employee has completed the form he/she can submit it by clicking on the submit button.**



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**New Link -> Form (S-252) -> is sent to Previous Employer**

Form will automatically generate and will be sent to previous division employer to verify years of service. The previous division Secretariat office/employer will fill out the form, attach any documentation and submit it electronically.



**PDF -> is sent to [ITR] and returned to SEC**

A PDF (S254) is generated with the information from the employer. The (ITR) reviews the (S254) information, if information is correct, signs it and returns it by email to [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org).



**Complete Documentation -> is sent to Committee**


NAD Secretariat prepares the documentation and sends it to the committee for approval.



**Notification -> is sent to ITR/Employer/Former Employer**

Once the committee has met and approved the transfer a Approval Letter is sent to the Independent Transfer/Employer/Former Division.

→ **An initial letter will be sent to the Independent Transfer's email. Click on the link and the form will pop up in your browser. Fill in the blank spaces before submitting the form. Please read the information thoroughly before submitting the form.**



Seventh-day  
Adventist Church  
NORTH AMERICAN DIVISION

## Independent Transfer Letter

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Personal Information

**Date**  
Date captured on form submission

**First Name \***

**Last Name \***

**Email \***

Employer Information

**Employer**

- Conference
- Union
- Universities
- NAD Entities
- Other Entities

**Independent Transfer Letter**

Please review and sign your selected letter below. Please note: Vesting is the process by which an employee accrues non-forfeitable rights over employer-provided stock incentives or employer contributions made to the employee's qualified retirement plan account or pension plan.

**Transfer Information \* (?)**

- Transferred Before 1999
- Transferred After 2000

**Signature \***

[Submit Independent Transfer Letter](#)

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- If at any point you need assistance please email us at [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org) with a subject line that stating *Independent Transfer* or call us at 443-391-7113 Monday- Thursday 8:00 AM – 6:00 PM.

### Personal Information

- The date will automatically fill in.
- Type your first name, your last name and your email address.
  - **\*Email information is very important.** Please type carefully and accurately. This email address will receive important information in regards to the status of your application.

#### Personal Information

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Date

12/23/2015

First Name \*

Last Name \*

Email \*

### Employer Information

- Select your current employer.
- If you select Conference a drop down menu will appear. Please select your conference. The Union will **automatically** fill in.
- If you select Union a drop down menu will appear and you will need to select your Union.

#### Employer Information

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Employer

- Conference
  - Union
  - Universities
  - NAD Entities
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**Independent Transfer Letter**

- The letter refers to the current process of (IT) in the NAD Working Policy Handbook.
- First, select whether you transferred before 1999, or transferred after 2000.
- Depending on your selection, a specific letter will show.
- Please read the information carefully. If you have any questions please send your questions to: [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org)



## Signature

- Next, click on the 'Sign' button.
- A box will pop up. It will allow you to sign your name.
- Please type or draw your name.
- To draw, please click on the 'Draw' tab.
- Once you have finished signing please click on the 'sign' button.

Sign Document



Type Draw


- ➔ Next, a link will be sent to the email that was provided for the Independent Transfer application (S-251). When you click the link in the email an application will pop up.
- ➔ If at any point you need assistance please email us at [valerierobbins@nadadventist.org](mailto:valerierobbins@nadadventist.org) or call us at 443-391-7113 Monday- Thursday 8:00 AM – 6:00 PM.


### **Independent Transfer Application Form (S-251)**

This form will contain 4 sections.

- **Personal Information**
    - Fill in ALL of the requested information to the best of your knowledge.
  - **Education and Employment Data**
    - To add additional employers please click the word [Add] located underneath the number 1 in the 'Denominational Employment Data' section.
  - **Additional Documentation**
    - Indicate whether you will provide a copy of your original **service record** by clicking next to the radio button that states yes or no.
  - **Attach Supporting Documents**
    - Follow the directions on the form for uploading documents.
    - Attach all documentation that has been requested:
      - **I-9 or A Copy of the Permanent Residency Card (USA Only)**
      - **Service Record From Previous Division**
      - **2 Forms of Identification (If you included the I-9 or Permanent Residency Card, one more form of ID is fine.**
  - **Review** the information that you have provided and click on the submit button once you have completed the form.
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## S-251 Form Sample

<h3>S-251 Independent Transfer Application</h3> <p>Application for Division Status/Independent Transfer to North American Division (S-251)</p>	
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### Personal Information

<b>First Name *</b>	<b>Please enter your name (first name)</b> Peter	
<b>Last Name *</b>	<b>Please enter your surname (last name)</b> Pan	
<b>Email *</b>	stellaoliveras@nadadventist.org	
<b>Phone Number *</b>	333.333.3333	
<b>Current Address *</b>	<b>Street Address</b> 12501 Old Columbia Pike	
	<b>Address Line 2</b>	
	<b>City</b> Silver Spring	<b>State / Province / Region</b> Maryland
	<b>Postal / Zip Code</b> 20904	<b>Country</b> USA
<b>Marital Status *</b>	<input checked="" type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Divorced <input type="radio"/> Widowed	
<b>Social Security Number/ ID Number * (?)</b>	999.99.9999	
<b>Date of Birth *</b>	01/20/1988	
<b>Place of Birth *</b>	TEST	
<b>Originating Division *</b>	South American	
<b>Date of Entry to US/Canada *</b>	11/24/2015	
<b>Citizenship *</b>	<input checked="" type="checkbox"/> United States <input type="checkbox"/> Canada <input type="checkbox"/> Other	
<b>File Upload (PRC)</b>	<b>Please upload a copy of your Permanent Resident Card.</b> nav_arrow_point_down-128.png	3.02KB
<b>First Denominational Employer in NAD *</b>	test	
<b>Beginning Date of Employment in NAD *</b>	12/14/2015	
<b>Current Employer *</b>	Florida Conference	
<b>Human Resource Email *</b>	test@gmail.com	
<b>Current Position *</b>	Pastor	

## Education and Employment Data

List your educational achievements & degrees etc. Give name and address of school and graduation dates.

Elementary	<input type="text" value="Test"/>
Secondary	<input type="text" value="Test"/>
College	<input type="text" value="Test"/>
Other	<input type="text" value="Test"/>

## Denominational Employment Data prior to coming to North American Division

	Position	Employee Organization	Location	From Date	To Date
1	<input type="text" value="Pastor"/>	<input type="text" value="SAD"/>	<input type="text" value="Brazil"/>	<input type="text" value="2/6/2013"/>	<input type="text" value="9/1/2015"/>

[Add](#)

## Additional Documentation

**Service Record\*** **Are you able to provide a copy of the original service record?**

Yes  
 No

If you are transferring to the United States and you have **not** filled out an I-9 form please follow the instructions below. Note: If working in Canada there is no need to fill out I-9 form.

- Click on the link below
- Download this form
- Fill it out
- Save copy to your computer
- Upload it to this application

Link: <http://www.uscis.gov/sites/default/files/files/form/i-9.pdf>

## Attach Supporting Documents

This secure system allows for this information to only be seen by those who have a license. Please upload the following documents: (1). I-9 or A Copy of the Permanent Residency Card (If not done up above) (2). Service Record From Previous Division (3). 2 Forms of Identification

**Documents\***

Or drag files here

Note: If you have any questions in regards to this form please contact us at [secretariat@nadadventist.org](mailto:secretariat@nadadventist.org)

**Years of Service\*** **If you do not know how many years of service you have please contact your originating division.**

**Vested\*** **If you do not know if you are vested please contact your originating division.**

Yes  
 No

**Signature\*** **By entering your name below you are confirming that this information is valid.**


**Date**

## Independent Transfer Application Form (S-252)

Once S-251 has been submitted the Division Secretariat Office will receive form (S-252).

- The (S-252) Form will contain certain information from form (S-251):
  - Denominational Employment Data - Prior to employment at the North American Division.
  - Personal Information – Full Name, Email, and Originating Division.
  - Employment Information – Current Position and Employer

**S-252 Independent Transfer Application**



Application for Division Status/Independent Transfer to North American Division (S-252) If you need assistance with filling out this form please email: [valerierobbins@nadadventist.org](mailto:valerierobbins@nadadventist.org) | Phone: 301.680.6467

**Date:** 2/1/2016

**To:** South American

**From:** North American Division Secretariat

**Subject:** Independent Transfer

The North American Division is preparing to vote an independent transfer for Peter Pan who was employed as follow:

### Denominational Employment Data prior to coming to North American Division

	Position	Employee Organization	Location	From Date	To Date
1	Pastor	SAD	Brazil	02/06/2011	09/01/2011

### Personal Information

**First Name** Please enter your name (first name)

**Last Name** Please enter your surname (last name)

**Email**

**Date of Birth**

**Originating Division**

### Employment Information

**Beginning Date of Employment in NAD**

**Current Employer**

**Human Resource Email**

**Current Position**

- The Division will need to fill out the sections 1. Division Information and 2. Service Information.

## Division Information

Please fill in the following information.

Financial Obligations\*  Yes  No

Contact Email\* Please provide the email of the person who needs to be contacted in regards to financial obligations.

Service Records\* Please upload a copy of the complete original service record with signature and clearance according to policy.

Upload

Or drag files here

## Service Information

Please provide the years of service, if they are vested and if they have retired.

First Name Peter

Last Name Pan

Years of Service\* 6

Vested\*  Yes  No

Retired\*  Yes  No

Signature\* Sign

Comments

Approve

Reject

- Division Information
  - Financial Obligation – Whether the individual has a remaining balance with the previous employer.
  - Contact Email – Contact information for the individual that will handle the payment of the financial obligations.
  - Service Records – Upload the service records information with a signature and clearance.
  
- Service Information
  - First and Last name – These fields will be read only. You are not able to make a correction to the name you will only be able to read it.
  - Years of Service – Provide the years of service (year and months of service) that the individual accumulated while working for your division.
  - Vested – State whether the individual is vested by selecting yes or no.
  - Retired – State whether the individual is retired by selecting yes or no.
  - Sign – Click on the sign button. A window will pop up that will give you the opportunity to sign the form. You will be given 2 options either to sign with a stylus or by simply type your name.
  - Comment Section - If you would like to add any additional comments, statements, or information please do so in the comment section.



## **Applicant's Statement – Relationship to Home Division PDF (S-254)**

An email with a PDF will be sent to the Independent Transfer's email provided on form (S-251)

- This PDF will contain the Independent Transfer Name, which Division he/she is transferring from and the NAD effective date of transfer.
- Section A and B - The PDF will also provide how many years of service that are vested or not based on the information we received from the previous Division.
- Sections C, D and E – The box will come pre-checked depending on when you transferred to NAD. If you have questions, send an email to [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org).
- If there are any discrepancies or questions on vesting we urge the Independent Transfer to contact their [HR office or email independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org).

Dear Pastor/Mr. Pan:

Please read over the attached form, and then sign it and return a copy to me and to your current NAD employer. Refer any Retirement and vesting questions to the current/former employer or the North American Division Retirement office. If everything is to your satisfaction, please complete the **S-254 form**, and send a copy to me and to your employer.

If we have missed some service, this is the time to get this corrected. Please contact the former division and get it cleared up right away, and once you have it cleared, then let us know and we will resend the verification document for a signature. If you are concerned about losing service, please discuss this with the Division as well.

Thanks in advance for your attention to this matter.

Sincerely,

**Valerie Robbins**  
Sr. Office Administrative Assistant  
North American Division  
12501 Old Columbia Pike  
Silver Spring MD 20904  
(301) 680-6467  
(301) 680-5076 Fax  
[valerierobbins@nadadventist.org](mailto:valerierobbins@nadadventist.org)

*Let the words of mouth, and the meditation of my heart, be acceptable in thy sight, O Lord, my strength, and my redeemer. Psalms 19:14*

*"God does His deepest work in you when you are in the deepest distress. You see, He loves you too much to let you miss His best."*  
Unknown

*"Don't pray when you feel like it. Have an appointment with the Lord and keep it. A man is powerful on his knees."* Corrie Ten Boom



Pan Peter - S-254 PDF -  
4202016.pdf

## **APPLICANT'S STATEMENT--RELATIONSHIP TO HOME DIVISION-S254**

I, **Peter Pan** have applied for an independent transfer from the **Name of Division** to the North American Division effective **Date started NAD** on the following basis:

1. This independent transfer is on my own responsibility.
2. No furlough privileges will be granted nor homeland visits at denominational expense.
3. In harmony with established procedures applicable to all denominational workers, retirement benefits, when due, will be granted according to the provisions of the retirement policies of the respective division(s) at the time the retirement application is submitted.
4. Benefits shall be paid in local currency where it is impossible to transfer funds. (See *GC Working Policy Z 20 05-4.*)

### **A. EMPLOYEES NOT VESTED IN THEIR HOME DIVISION THEREBY LOSING SERVICE CREDIT**

The (**Name of Division**) (my home division) states that I have **# years (and months)** of service credit which is not adequate for vesting in the Division. I therefore agree to forfeit any accrued years of service in my home division unless at a later date I return to labor in the Division, and thereby earn enough service credit to meet that division's vesting requirements. I understand that, for periods prior to January 1, 2000, I will earn North American Division service credit beginning on the date of my employment in the NAD and according to the NAD *Working Policy Z 25 15*, unless restricted by Z 25 30. A copy of this agreement will be on file at the North American Division Secretariat and in the secretariat of my home division.

### **B. EMPLOYEES VESTED IN THEIR HOME DIVISION**

The (**Name of Division**) (my home division) states that I have **# years (and months)** of service credit and therefore I am vested in the Division. Retirement benefits will be paid to me as provided by NAD E 20 35 and NAD Z 25 30. I understand that, for periods prior to January 1, 2000, I will earn NAD service credit beginning on the date of my employment in the NAD and according to NAD *Working Policy Z 25 15*, unless restricted by Z 25 30. A copy of this agreement will be on file at the North American Division Secretariat and in the secretariat of my home division.

### **Instructions**

Once you have confirmed the information on this document, please check the appropriate box (for C, D & E) and sign and date the document. If you are not sure, please contact either the Human Resources office of your current employer or the Retirement office for clarification. (email: [nadretirement@nadadventist.org](mailto:nadretirement@nadadventist.org).)

**C. Employees who were employed in the North American Division before January 1, 1978**

The Division (\_\_\_\_\_) states that I have \_\_\_ years of service credit. Since I was employed in the North American Division before January 1, 1978, I understand my service in my home division may be included in my North American Division retirement benefits, after meeting minimum requirements in the NAD.

**D. Special Provision for Retirement After December 31, 1999**

If I was an employee of a participating employer on December 31, 1999 and my independent transfer occurred after December 31, 1977 and before the deadline of December 31, 1999, I understand that in order for my service in my home division to be included in my North American Division retirement benefits, I must meet the requirements of being vested in the NAD Plan by December 31, 2014, with at least ten years of service. (Retirement Office will determine if D applies.)

**E. Post-1999 Independent Transfer**

Since I transferred independently after 1999, and do not have North American Division qualifying service credit prior to 2000, I understand that I will not be eligible for any pension from the NAD, and will only be eligible for the payout of my retirement savings account under the Adventist Retirement Plan, and only for years of employment in the NAD. Any pension for pre-NAD service credit will not be the responsibility of the North American Division.

Signed \_\_\_\_\_ Date \_\_\_\_\_

**INSTRUCTIONS**

Please save this document to your computer. Once you have completed this pdf thoroughly, proceed to attach it to a new email and send it to this email address: [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org) or call (443) 391-7113.

If the years of service are not correct, please contact your former division directly to clarify the years of service. It is very important to keep us informed of the outcome. If the years of service change, please email [independenttransfer@nadadventist.org](mailto:independenttransfer@nadadventist.org). If you need further assistance, contact us at the email address given above.