

Annuitant Earnings After Retirement Instructions for TRA-4620

List only employees participating in the Annuitant Employment Program (AEP) during the period July 1, 2021, to June 30, 2022. These are employees who receive an annuity or retirement benefit from a Minnesota State colleges and universities retirement program.

AEP annuitants under normal retirement age (NRA) are subject to an annual earnings limitation when employed in a TRA-covered employing unit. A TRA annuitant is a person who has **retired and is currently receiving a TRA monthly retirement annuity.**

Form TRA-4620 Minnesota State is due in our office by **October 15, 2022.** After that date, a fine of \$5.00 per calendar day must be paid until the form is received.

1. List only AEP annuitants; AEP annuitants older than NRA by July 1, 2021 do not have to be listed.
2. List any salary that was earned by a TRA annuitant for TRA-covered service, including income from services performed as a consultant or as an independent contractor.
3. Report only gross salary earned after retirement during the 2022 review period, regardless of when the salary is actually paid.
4. Do not report severance payments, lump sum vacation or lump sum sick leave payments since these types of payments are not TRA-covered salary.
5. Please sign and date the form. Include your title and telephone number.
6. Position Code — Please use these letters to indicate the position of the retiree:
 - T Teacher or Substitute Teacher
 - A Administrator
 - C Consultant or Independent Contractor (must qualify under IRS rules)
 - S Interim Superintendent
 - P Employee of a third-party supplier
7. Salary Prior to Month Reaching Normal Retirement Age (NRA), **only for annuitants who attain NRA in fiscal year 2022.** This column should be blank for all others.

<u>Year of Birth</u>	<u>NRA</u>
1940	65 and 6 months
1941	65 and 8 months
1942	65 and 10 months
1943 - 1954	66
1955	66 and 2 months
1956	66 and 4 months
1957	66 and 6 months
1958	66 and 8 months
1959	66 and 10 months
1960 and later	67 years

As an authorized representative of this employing unit, I verify that this is a complete listing of all Annuitant Employment Program participants, hired as teachers, substitute teachers, administrators, employee of a third-party supplier, independent contractors, consultants and interim superintendents for the period July 1, 2021 to June 30, 2022, and it is an accurate listing of the compensation earned by each individual listed.

Signature		Reporting Unit	
Title			
Date	Telephone		

TRA-4620 Minnesota State colleges and universities

