

DEFINED BENEFIT PLAN RETIREMENT ESTIMATE REQUEST

Return this form to your Counseling Center.



| MEMBER INFORMATION | | | |
|--|-------|----------------------------|--|
| Member SSN | | Dept/Agency where employed | |
| Member Full Name (First, Middle, Last) | | | |
| Street Address | | Worksite County | |
| City | State | Zip | |
| Daytime Telephone | | Home Telephone | |
| Office/Building where employed | | | |

| INFORMATION TO PREPARE AN ESTIMATE | | | |
|--|--|--|--|
| PROPOSED RETIREMENT DATE (Generally the day following your last day of employment) Enter proposed retirement date: _____ MM/DD/YYYY | TYPE OF ESTIMATE (Check all that apply) <input type="checkbox"/> Regular Retirement <input type="checkbox"/> Disability Retirement | EMPLOYMENT INFORMATION | |
| | | TYPE EMPLOYMENT <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal <input type="checkbox"/> 9 Month Faculty <input type="checkbox"/> 12 Month Faculty <input type="checkbox"/> Other | PAY DAYS PER YEAR <input type="checkbox"/> Monthly - 12 Pays <input type="checkbox"/> Bi-Monthly - 24 pays <input type="checkbox"/> 20 Pays <input type="checkbox"/> Bi-Weekly - 26 Pays <input type="checkbox"/> Weekly - 52 Pays <input type="checkbox"/> Other |
| FINAL AVERAGE SALARY (FAS) SERS will compute the FAS for current year estimates. The FAS for retirement dates beyond this year can be computed by SERS or you may supply the FAS to be used. <input type="checkbox"/> SERS computed <input type="checkbox"/> Member provided: \$ _____ | SURVIVOR'S SEX <input type="checkbox"/> Male <input type="checkbox"/> Female | EMPLOYMENT STATUS <input type="checkbox"/> Active <input type="checkbox"/> WRDL <input type="checkbox"/> H & L <input type="checkbox"/> LWOP <input type="checkbox"/> ACT 534 <input type="checkbox"/> Other <input type="checkbox"/> SLWOP <input type="checkbox"/> ACT 632 | |
| | SURVIVOR'S BIRTHDATE _____ MM/DD/YYYY | BASE SALARY PER PAY \$ _____ | |

| SERVICE PURCHASE INFORMATION | | | |
|--|--------------------------|----------------------------------|--------------------------|
| Do you have other service that you may be able to purchase toward your SERS pension? | Check box for yes | Have you purchased this service? | |
| | | Yes | No |
| Service from prior employment with the state | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service in the United States Armed Forces | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service credited with PSERS | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service for time teaching out of state | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service as a Justice of the Peace before January 1970 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service at a community college before July 1, 1971 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service in the Cadet Nurse Corps | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| SERS USE ONLY | | | |
|-----------------|-------------------|---------------------|---------------|
| Counselor Notes | Client Data Sheet | BEN03 DRO Indicator | |
| | Input Date | Date Checked | DRO Indicator |
| | Counselor | | |