

**RETIREMENT ESTIMATE REQUEST FORM**

Time frames for estimate processing:

1 estimate request per calendar year (may include up to 4 dates)

If employee is within 5 years of retirement – estimate will be completed within 120 days of request

If employee has 5 or more years until retirement – estimate will be completed within 180 days of request

NAME: \_\_\_\_\_ PHONE: \_\_\_\_\_ DATE OF REQUEST: \_\_\_\_\_

ORG: \_\_\_\_\_ RETIREMENT PLAN: \_\_\_\_\_ CSRS \_\_\_\_\_ OFFSET \_\_\_\_\_ FERS\* (For FERS only, include a copy of the SSA Earnings Statement for a more accurate FERS Supplement Calculation)

SPECIAL RETIREMENT (FF/LEO): \_\_\_ YES \_\_\_ NO (Requests for Special Retirement may take longer if no work history has already been completed. Providing copies of previous work histories, coverage letters from FLERT and/or covered position descriptions will assist the Specialist with processing your request.)

DATE(S) OF RETIREMENT (List up to 4 dates): \_\_\_\_\_

ESTIMATED SICK LEAVE BALANCE: \_\_\_\_\_ (leave blank if you want to use current balance)

**FOR YOUR ESTIMATE, DO YOU WANT:**

SURVIVOR ANNUITY: \_\_\_\_\_ YES \_\_\_\_\_ NO

If yes, \_\_\_\_\_ FULL \_\_\_\_\_ PARTIAL (If CSRS, give \$\$ amount)

HEALTH BENEFITS: \_\_\_\_\_ YES \_\_\_\_\_ NO PLAN NUMBER: \_\_\_\_\_ (e.g. 105)

LIFE INSURANCE: \_\_\_\_\_ YES \_\_\_\_\_ NO

\_\_\_\_\_ Basic If yes, reduced: \_\_\_\_\_ None \_\_\_\_\_ 50% \_\_\_\_\_ 75%

\_\_\_\_\_ Option A

\_\_\_\_\_ Option B If yes, reduced: \_\_\_\_\_ Full \_\_\_\_\_ No reduction

\_\_\_\_\_ Option C If yes, reduced: \_\_\_\_\_ Full \_\_\_\_\_ No reduction

**FEDERAL TAX WITHHOLDINGS:**

\_\_ Single (including head of household) \_\_ Married \_\_\_\_\_ Number of withholding allowances

**IF YOU HAD ANY OF THE FOLLOWING (if yes, do you have a copy of the Paid in Full receipt?):**

DID YOU PAY YOUR TEMPORARY TIME (FICA): \_\_\_\_\_ YES \_\_\_\_\_ NO \_\_\_\_\_ NA

DID YOU PAY YOUR MILITARY DEPOSIT: \_\_\_\_\_ YES \_\_\_\_\_ NO \_\_\_\_\_ NA

DID YOU WITHDRAW RETIREMENT CONTRIBUTIONS AND THEN MAKE A REDEPOSIT?

\_\_\_\_\_ YES \_\_\_\_\_ Date of Withdrawal \_\_\_\_\_ NO

**DATE RECEIVED IN HR:** \_\_\_\_\_ **RECEIVED BY:** \_\_\_\_\_ **COMPLETED:** \_\_\_\_\_