

**REQUEST FOR RETIREMENT ANNUITY & VSIP ESTIMATE**

NAME \_\_\_\_\_ Telephone \_\_\_\_\_

Organization \_\_\_\_\_ Room # \_\_\_\_\_

Projected Retirement Date(s) \_\_\_\_\_

Sick Leave Balance \_\_\_\_\_ Social Security # \_\_\_\_\_

Retirement Contributions to Date: \$ \_\_\_\_\_ CSRS\* \$ \_\_\_\_\_ FERS\*

1. Type of retirement you wish to apply for: *EARLY OPTIONAL FERS MRA+10 DISABILITY*

2. Which retirement system are you currently under? *CSRS CSRS OFFSET FERS*

YES NO

3. Compute Voluntary Separation Incentive Payment (VSIP)? \_\_\_\_\_

4. Did you transfer from CSRS to FERS? \_\_\_\_\_  
 If no, go to question 5.  
 Approximate date of transfer \_\_\_\_\_

Sick Leave balance at time of transfer to FERS \_\_\_\_\_

5. Do you want a survivor annuity computed? \_\_\_\_\_  
 a. If yes, spouse's date of birth \_\_\_\_\_  
 b. If CSRS, will you elect full survivor benefits (55%) \_\_\_\_\_  
 If no, what base amount will you use? \_\_\_\_\_  
 c. If FERS will you elect:  
 Full Survivor Benefits; \_\_\_\_\_  
 1/2 (50%); or \_\_\_\_\_  
 No Benefit \_\_\_\_\_

6. Any part-time Federal civilian service since 4/1/86? \_\_\_\_\_

7. Have you ever left Federal service and withdrew your retirement deductions? \_\_\_\_\_  
 If no, go to question 8.  
 a. Approximately what year? \_\_\_\_\_  
 b. Since you've returned to service, have you redeposited that money?\*\*\* \_\_\_\_\_  
 If no, go to question 8.  
 c. If not, amount of payments made \$ \_\_\_\_\_.

8. Have you ever held any temporary Federal civilian positions with the Government? \_\_\_\_\_  
 If no, go to question 9.  
 a. If yes, have you made a deposit for that time?\*\* \_\_\_\_\_  
 If no, go to question 9.  
 b. If yes, is deposit complete? \_\_\_\_\_  
 If yes, go to Question 9.  
 c. If no, estimate of amount of payment made \$ \_\_\_\_\_

9. Do you have any Military time? \_\_\_\_\_
- If no, go to question 10.
- a. Was any of the service post 1956? If no, go to 9c. \_\_\_\_\_
  - b. Has a deposit for that military time been made?\*\*\* \_\_\_\_\_
  - c. Are you receiving retired military pay? \_\_\_\_\_
  - d. Is your retirement based on combat incurred injury or disease? \_\_\_\_\_
  - e. Will you be waiving your military retirement pay? \_\_\_\_\_

10. To carry health benefits during retirement, you must have carried health benefits for the five years immediately preceding your retirement (this includes Tricare for military). If eligible, do you want to continue health benefits coverage during retirement? \_\_\_\_\_

If yes, plan number \_\_\_\_\_

11. To carry life insurance during retirement, you must have carried life insurance for the five years immediately preceding your retirement. If eligible, your annuity estimate will include a deduction for Federal Employee Group Life insurance. FEGLI Code \_\_\_\_\_\*

At retirement you will be required to select a reduction level for your basic insurance. Please check the reduction level you would be most likely to choose.

- \_\_\_\_\_ 75% reduction (at age 65 basic insurance will decrease by 2% per month until it reaches 25% of original amount)(least expensive option)
- \_\_\_\_\_ 50% reduction (at age 65, basic insurance will decrease by 1% per month until it reaches 50% of original amount.
- \_\_\_\_\_ No reduction (there is no change in amount of basic coverage regardless of age ) (most expensive option)

12. The estimated Federal Taxes to be withheld may be computed:

Single \_\_\_\_\_

Married \_\_\_\_\_

Number of Exemptions Claimed: \_\_\_\_\_

13. Please submit copy of most recent Social Security statement.

\* These can be found on your pay statements

\*\* You will be given the opportunity to make these payments upon retirement if you wish to do so.

\*\*\* Post '56 military deposit **MUST** be **PAID IN FULL BEFORE** retirement – you will **NOT** be given the opportunity to make this payment after retirement.