

Information for Retirement Estimate 2020

Name:	Spouse?	Yes	No
Full Address:			
Special Retirement: ___	Law Enforcement	Fire Fighter	___ CBPO
Phone:	Retirement System	CSRS	FERS
Email:	Transfer to:	FERS	CSRS Offset
Date of Birth:	If so, date		
Service Comp Date for Retirement:	Amount of SSA at Age 62:		
Date(s) of Retirement:	SSA At FRA Age:		
Military Time Dates (to/From):	Paid In?	Yes	No
	Pre Interest Amount?		
Temporary FICA Time Dates (to/From):	Paid In?	Yes	No
	Pre Interest Amount?		
Part Time or Casual/PTF/PMR Service?	Dates/Hours: (Mo/Day/Yr) format		
Refunded / Withdrawn Time (to/from):	Paid back?	Yes	No
	Amount Withdrawn?		
Multiple Agency Work?	List Agencies and To/From dates		
If Retiring in the next three years: List last 3 years salary amounts and dates of salary change (include locality pay): (Mo/Day/Yr) format Do not use W-2s or Income Tax records	If Retirement is more than 3 years out: Complete Boxes Below		
	Current Salary:		
	Current Grade and Step:		
	Date of Last Within Grade:		
From Most Current Paystub:			
FERS/CSRS Retirement \$ _____,	Dental \$ _____,	Vision \$ _____	
SS/OASDI \$ _____	Flex Spending \$ _____, Medicare \$ _____		
Federal Tax \$ _____, State Tax \$ _____	Allotment \$ _____,	TSP Loan \$ _____	

Helpful if I can see your last pay stub to check deductions

Personnel Solutions
 S. 3403 Tekoa St.
 Spokane, WA 99203
 Phone (509) 993-2283
 Fax (509) 651-1946
 Email: Retirelady@mail.asisna.com

Survivor Benefit Desired:

1) CSRS: 0% to Full _____% **OR** _____ amount per month for survivor.

2) FERS (mark one): **0%** **25%.** **50%**

Former Spouse Eligible for Survivor Annuity or Divorce in Progress? Y N **Bring Decree**

Sick Leave Hours to be Saved Each Pay Period: 0 1 2 3 4 (Hours-Biweekly)

Current Sick Leave Balance? _____

Health Insurance: FEHB Plan Number / Costs PPP: _____ Tricare Y N

Life Insurance

Below: Mark what life insurance you have today and then choose, via the dropdowns, which you would like to have at retirement. Children are only covered until age 22 unless disabled.

Basic	Option A	Option B		Option C	
Reduce Benefit at Age 65?	Keep in Retirement?	# Options Today	# Keep in Retirement	# Options Today	#Keep in Retirement
No	Y				
50%	N		Reduce Benefit at Age 65?		Reduce Benefit at Age 65?
75%			Y N		Y N

**** Ages of Children:** _____

Thrift Savings Plan

Existing Savings \$ in TRADITIONAL	G: \$ _____	F: \$ _____	C: \$ _____	S: \$ _____	I: \$ _____
	L: \$ _____	L Fund: _____	L: \$ _____	L Fund: _____	
Existing Savings \$ in ROTH	G: \$ _____	F: \$ _____	C: \$ _____	S: \$ _____	I: \$ _____
	L: \$ _____	L Fund: _____	L: \$ _____	L Fund: _____	
Pay Period Contributions	Traditional	\$ _____	or % _____	Catchup	\$ _____
	Roth	\$ _____	or % _____	Catchup	\$ _____
% of Contribution to Each Fund Must Equal 100	G: % _____	F: % _____	C: % _____	S: % _____	I: % _____
	L: % _____	L Fund: _____	L: % _____	L Fund: _____	

Withdrawal Preference: _____

Age: _____

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