

5 N 5th Street  
 Harrisburg PA 17101-1905  
 Toll-Free: 1-888-773-7748  
 Web Address: www.pfers.state.pa.us

# Request for Retirement Estimate



PSRS-151 (09/2012)

**Complete this form only if your anticipated retirement date is within the next 12 months. See instructions on the reverse.**

<b>Member Name</b>	<b>Social Security Number</b>	<b>Daytime Phone</b>
<b>Address (Street, City, State, Zip)</b>	<b>Email Address</b>	<b>Evening Phone</b>

<b>Tentative Date of Retirement:</b> _____	<p><i>Provide your current school year's (July 1 – June 30) salary. PSERS will project your final average salary based on the information provided by you and your employer.</i></p> <p><b>Current School Year's Salary:</b> _____</p>
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<b>Survivor Annuitant:</b> <i>(See definitions on reverse.)</i>	<b>Type of Estimate Request:</b> <i>(check all that apply)</i>	<b>Current Employment Status:</b>
Date of Birth _____ Gender _____ <input type="checkbox"/> Spouse / <input type="checkbox"/> Non-spouse <i>(please check one)</i>	Regular <input type="checkbox"/> Disability <input type="checkbox"/>	Active <input type="checkbox"/> Unpaid Leave <input type="checkbox"/> Terminated <input type="checkbox"/>

<b>Previous PSERS Retiree:</b> Yes <input type="checkbox"/> No <input type="checkbox"/>	<p>Part-time members and members who are not retiring in June must complete the following: Number of days <b>or</b> hours from July 1 through June 30 that you expect to work in your final school year of employment:</p> <p>Days: _____ - <b>OR</b> - Hours: _____</p>
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<b>Your Signature:</b> _____	<b>Date Signed:</b> _____
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**Upon completion, forward or fax this form to:**

**PSERS**  
 5 N 5th Street  
 Harrisburg PA 17101-1905  
 FAX: 717-772-3860

**REMINDERS:**

- ❖ **Purchase of Service:** If applicable, your completed application to purchase credit for service must be received by PSERS prior to your last day of paid service. Please visit the PSERS website or request the "Let's Talk About Purchasing Credit for Service" pamphlet for more details.
- ❖ An *Application for Retirement* must be filed with PSERS within 90 days of your date of termination for retroactive benefits. Otherwise, your benefit will be effective the date your *Application for Retirement* is received by PSERS.
- ❖ **THIS FORM IS NOT AN APPLICATION FOR RETIREMENT.**

<b>FOR PSERS USE ONLY</b>			
<b>Retirement Date:</b> _____		<b>Frozen Annuity:</b> Yes / No	
<b>Final Average Salary:</b> _____	<b>Years of Service:</b> T-C _____ T-D _____ Total _____	<b>Contributions:</b>	
		Taxable _____	Pre-87 _____ Post-86 _____
<b>Debt:</b> Purchase of Service/Overpayment/ Frozen Annuity _____		CNW _____	Interest _____
<b>Comments</b> <i>(divorce, MDIB, etc.):</i>			

## Understanding the *Request for Retirement Estimate (PSRS-151)*

Complete this form only if your retirement date is within the next 12 months or if you qualify for one of the exceptions listed below. Otherwise, you are able to produce your own estimates.

- Work **only** part-time
- Have a frozen annuity (you previously received a monthly benefit from PSERS)
- Are vested (eligible for a monthly benefit) but not presently working for a PA public school
- Considering disability benefits within the next 12 months
- Are a multiple service member and considering retirement within the next 24 months  
(Multiple service is the credited service of a member who has elected to combine his credited service in both the Public School Employees' Retirement System and the State Employees' Retirement System (SERS).)

If none of the above situations applies to you, please use the revised and improved PSERS estimate calculators available on our website, [www.psers.state.pa.us/calc.htm](http://www.psers.state.pa.us/calc.htm). The PSERS retirement estimate calculators allow you to produce an unlimited number of estimates of your potential PSERS retirement benefits.

Please read the following information to assist you with the proper completion of the *Request for Retirement Estimate (PSRS-151)*. This information is used to calculate your benefit estimate. If PSERS does not receive accurate information, your benefit estimate will not reflect an amount close to the actual retirement benefit you should receive. **Please be sure to verify the information you supply on this form before sending it to PSERS.** This will help avoid any errors in your estimate request. Members are limited to two PSERS staff-produced estimates in the year in which they intend to retire.

### Current School Year Salary

A school year salary can be defined as the gross pay earned between July 1 and June 30 of each fiscal year. It is a key element in determining the retirement benefit; therefore, it is very important that the final information provided is as close to the true amount as possible.

### Survivor Birth Date

The Survivor Birth Date is the date of birth of your proposed survivor annuitant. The survivor's date of birth and gender are used in the estimated benefit calculation under Options 2 & 3.

If the date provided is incorrect, it will alter the estimated benefit amount under those options for your projected monthly benefit as well as the survivor's projected benefit.

If you choose a non-spouse, there may be a percentage cap on the amount that he or she may receive.

### If An Error Occurs

After you receive the retirement estimate from PSERS, you should review the figures used for the calculation. If you receive the retirement estimate from PSERS and you detect an error, contact the PSERS Member Service Center toll-free at: 1-888-773-7748. You may also contact PSERS via email at **ContactPSERS@pa.gov**.