

## Oregon Public Service Retirement Plan (OPSRP) Estimate Request

**Important: Read instructions before you complete and submit the attached form.**

### General instructions

- Fill in the personal information block in Section A completely. If you do not know your PERS number, leave it blank.
- Type or print clearly in dark ink. Illegible forms could be returned to you, which could delay your request.
- Sign and date at the bottom of the form, and mail or fax the form to PERS.

### Section B: Retirement date

Enter the month and year you want to retire. For example, you could use the month after your anticipated last day of employment. You can only use one date per form. If you want an estimate for more than one date, fill out additional forms. If you want to retire with 30 years of service, enter “Retire with 30 years.” **Only two estimates will be provided free of charge in a calendar year. (Note: We can only provide estimates for retirement dates within 24 months.)**

### Section C: Beneficiary

Enter your beneficiary’s first name (no last name required) and his or her date of birth so we can provide the full and half-survivorship options. If you leave this section blank or if you enter an estate or trust, survivorship options are not available. The younger your beneficiary is, the lower your survivorship option benefits will be. (Survivorship options include Full-Survivorship, Half-Survivorship, Full-Survivorship Increase, and Half-Survivorship Increase.) This beneficiary information does not change your official beneficiary designation.

### Section D: Current or last PERS employer

Enter the name of your current or last PERS employer.

Sign and return the form to:

PERS

PO Box 23700

Tigard OR 97281-3700,

You can also fax this form to Customer Service at 503-598-0561

