



Member Request

515-135-15
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PART 1 – MEMBER INFORMATION

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Name (First, Middle, Last) Social Security number

Mailing address (Street or P.O. Box, City, State, Zip+4)

Daytime phone number

Marital status: (check one) Married Married, but separated Never married Widowed Divorced

PART 2 – REQUEST TYPE (Check all the boxes that apply to your request)

STATEMENT OF YOUR ACCUMULATED CONTRIBUTIONS

ACCOUNTING OF YOUR YEARS OF OPERS SERVICE CREDIT – Please provide the following:

Unused sick leave hours:

Do you have active military service? Yes No

ESTIMATE OF YOUR RETIREMENT BENEFITS – Please provide the following:

Note: You must be within two years of retirement eligibility to request an estimate. Please see instructions on back for more information

Expected retirement date or “First eligible”:
Expected termination date (if applicable):
Survivor name (if applicable):
Survivor date of birth (if applicable):
Relationship (e.g., spouse, child):
Unused sick leave hours:
Do you have active military service? Yes No

REPAYING WITHDRAWN CONTRIBUTIONS

Last employer before withdrawal:

Approximate dates of employment:

DIVORCE: BENEFIT VALUATION INFORMATION – Please provide the following:

Date of marriage:

Date of filing/separation/divorce:

TRANSPORTING SERVICE TO THE OKLAHOMA TEACHERS’ RETIREMENT SYSTEM

IMPORTANT

OPERS must have certain vital documents on file before an estimate of your retirement benefits can be provided. **Your request will be denied without them.** Please see instructions on the back for more information.

To apply for **military service credit**, you must also complete the *Application for Military Service* and submit it to OPERS with a copy of your DD214.

Remarks or other requests:

Member’s signature _____ Date _____

Form Instructions

Please type or print in ink and mail or fax to the contact information provided below.

Please check all the boxes that apply to your request. **Note:** Estimate requests are prepared for members who are within two years of retirement eligibility. If you are not within two years of eligibility, OPERS can provide an accounting of your years of OPERS service credit, or you can use the online benefit estimator at www.opers.ok.gov to estimate your retirement benefit.

Expected retirement date – Please provide your expected retirement date. If you do not know when you can retire, enter "First Eligible" and OPERS will calculate your benefit at the earliest time you will be eligible for retirement. **Note:** This date does not preselect your actual retirement date, nor does it give notice to OPERS of your intention to retire.

Expected termination date – If applicable, please provide your expected termination date if you expect to terminate employment before you are eligible to retire (e.g., resigning next year and draw at age 62). This is your last expected date on the payroll and is used to determine your total service credit in the benefit calculation.

Survivor's name, date of birth and relationship to member – One of four types of benefits may be selected by members choosing normal or early retirement. If you wish to include an estimate of survivor benefits upon your death, please provide the name, date of birth and your relationship to the person you are considering to receive survivor benefits and OPERS will calculate amounts for all four benefit options. For more information on the four benefit options, call or visit the OPERS website.

Vital documents – In order to receive a benefit estimate, you must provide legible copies of the following required documents necessary for OPERS to calculate the benefit estimate (Administrative Rule 590: 10-7-6(b)):

- **Birth Certificate** – Please provide a birth certificate for you and the survivor you named, if applicable. If you do not have a birth certificate, there are a number of other documents that you can provide in its place. You can find these listed on the OPERS website at www.opers.ok.gov/forms or by calling our office.
- **Marriage License** – If you are married at the time of retirement, your spouse has a legal right to be named as your survivor. In order to meet this requirement, we will need a marriage license to your current spouse.
- **Divorce Decree/Death Certificate** – If you were married and that marriage ended as a result of divorce or the death of your spouse, you will also need to provide a divorce decree or certified death certificate.

Unused sick leave – Enter the total number of hours of unused sick leave you have now or expect to have as of the expected retirement and/or termination dates you provided.

Active duty military service – Tell us if you have active duty military service for which you may be eligible to receive retirement service credit. For more information on military service, call or visit the OPERS website. Note: If you want retirement service credit for military service, you must provide your military documents (DD214) and an *Application for Military Service* in addition to this form.

Repaying withdrawn contributions – Any beneficiary designation you may have named prior to withdrawing is nullified at the time contributions were withdrawn. You must submit a new *Beneficiary Designation* form dated after you returned to employment with a participating employer.

Transporting service from OPERS to the Oklahoma Teachers' Retirement System (OTRS) – This form may be used to begin the process of transporting service from OPERS to the Oklahoma Teachers' Retirement System. If you wish to transport teachers' service to OPERS, your request must be made through the OTRS. OPERS will provide your account information to the OTRS.

Remarks or other requests. If you have any additional information or instructions for OPERS, use the space provided or indicate that you have attached a separate sheet (with your name and Social Security number). Also, use this space to notify OPERS if your request is for disability benefits or if you wish to purchase service.