5 N 5th Street
Harrisburg PA 17101-1905
Toll-free: 1.888.773.7748
www.psers.pa.gov
Fax: 717.772.3860

PSRS- 151 (07/2019)

Request for Retirement Estimate

Mail Center

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

Member Name	**Social Security Number**	**Daytime Phone** ( )
Address (Street, City, State, Zip)	**Email Address**	**Evening Phone** ( )

Tentative Date of Retirement: _____

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.

Current School Year's Salary: _____

Survivor Annuitant: *(See definitions on reverse.)*

Date of Birth _____
Gender _____
☐ Spouse / ☐ Non-spouse *(please check one)*

Type of Estimate Request: *(Check all that apply.)*

Regular ☐
Disability ☐

Current Employment Status:

Active/Paid Leave ☐
Unpaid Leave ☐
Terminated ☐

Previous PSERS Retiree:

Yes ☐ No ☐

Part-time members and members who are not retiring in June must complete the following: Number of days **or** hours from July 1 through June 30 that you expect to work in your final school year of employment

Days: _____ **- OR -** Hours: _____

Your Signature:	**Date Signed:**

Upon completion, forward or fax this form to:

PSERS
5 N 5th Street
Harrisburg PA 17101-1905
FAX: 717.772.3860

REMINDERS:

- **Class T-G, Class T-H, and Class DC members cannot request an estimate at this time.**
- **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 for more details.
- An *Application for Retirement* must be received by PSERS within 90 days of your termination date in order to receive retroactive retirement benefits. Even in those situations where there is a pending divorce action or purchase of service, in order to preserve retroactive benefits, the *Application for Retirement* must still be submitted within the 90 day time frame.
- **THIS FORM IS NOT AN *APPLICATION FOR RETIREMENT*.**

FOR PSERS USE ONLY

Retirement Date:		**Frozen Annuity:** Yes / No
Final Average Salary:	**Years of Service:** T-C _____ T-D _____ T-E _____ T-F _____ Total _____	**Contributions:** Taxable _____ Pre-87 _____ Post-86 _____
Debt: Purchase of Service/Overpayment/ Frozen Annuity _____		CNW _____ Interest _____

***Comments** (divorce, MDIB, etc.):*

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 estimate calculators available through PSERS Member Self-Service (MSS) Portal and on our website at *www.psers.pa.gov*. The PSERS retirement estimate calculators allow you to produce an unlimited number of estimates of your potential PSERS retirement benefits.

Please carefully 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 retirement covered compensation 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 all information provided is as close to the true amount as possible.

Please note that it does not include non-retirement covered compensation (e.g. incentives, severance pay, lump-sum payouts for sick, vacation, or personal leave, etc.)

Survivor Birth Date

The Survivor Birth Date is the date of birth of your proposed survivor annuitant. The survivor's date of birth is 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.***