



Missouri State Employees' Retirement System
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 Email: mosers@mosers.org • Website: www.mosers.org



IRF

Information Request for Retirement Planning

Please print. • See reverse side for instructions.

SECTION A - PERSONAL INFORMATION

Social Security Number or Member ID

Date of Birth

Name (last/first/middle)

Mailing Address (PO or street/city/state/zip)

Work Phone Number

Primary Phone Number (home/cell)

Email Address

SECTION B - BENEFIT ESTIMATE

Complete this section to request a basic benefit estimate including BackDROP if eligible.

Projected Retirement Date ____/____/01____

Projected Termination Date ____/____/____

• The first day of the calendar month you begin receiving retirement benefits.

• The date after which you are no longer an employee of the state as reported by your employer.

Estimated Hours of Unused Sick Leave

Spouse's Date of Birth (if applicable)

BackDROP Estimate (if applicable)

Please calculate using the following retirement date: ____/____/01____

Please calculate using the following scenario: _____

SECTION C - COST-OF-LIVING ADJUSTMENT (COLA) PROJECTION

Complete this section to request an estimate which includes specific information on how COLAs may affect your future retirement benefit. Please select a benefit payment option for your COLA projection. (Note: We use the current COLA rate for projections).

Missouri State Employees' Plan (MSEP)

- Life Income Annuity Unreduced Joint & 50% Survivor
 Joint & 100% Survivor 120 Guaranteed Payments

Missouri State Employees' Plan (MSEP 2000)

- Life Income Annuity Joint & 50% Survivor
 Joint & 100% Survivor 120 Guaranteed Payments

SECTION D - MEMBER RESOURCES (WWW.MOSERS.ORG)

MOSERS provides many valuable resources and educational materials designed to help you understand the benefits you receive as a state employee as well as guide through the retirement process. All this information and more is available on our website at www.mosers.org.

Publications

- | | |
|---|---|
| Books | Brochures |
| <ul style="list-style-type: none"> • Member Handbooks • Life Insurance Handbook • Long-Term Disability Handbook • Retirement Packet (retirement process & applications) | <ul style="list-style-type: none"> • BackDROP • Acquiring Service Credit • Divorce and Your MOSERS Benefit • Special Tax Notice • Comparison of Retirement Plan Benefits |

Additional Information

- Check out MOSERS' Video Library
- Set up a password and securely access your personal information
- Complete forms online or download a PDF
- Print your own benefit estimate
- View additional publications and educational materials
- Catch up on the latest news about your MOSERS benefits

I currently do not have access to the website. Please mail me the following publication(s): _____

SECTION E - Member Signature

I hereby request a benefit estimate to include the information I have provided above. I understand that the retirement information I will receive in this estimate is derived from information MOSERS has accumulated throughout my career. Any benefit amounts shown are based on estimates only. I understand that MOSERS strives for accuracy, it is possible that some portion of my records may contain an error. If I find an error(s), I need to report them to MOSERS as soon as possible. I also understand that the benefit amounts provided in this estimate must be verified and, if necessary, corrected before any payment can be made. Last minute corrections could change the amount of the benefit I will receive or even my eligibility to receive a benefit.

Signature

Date

Instructions for Completing

Information Request for Retirement Planning

MOSERS provides many valuable resources and educational materials designed to help you understand the benefits you receive as a state employee as well as guide you through the retirement process. The *Information Request* form allows you to request a benefit estimate based on personal information accumulated by MOSERS throughout your career. Additional information and materials can be accessed by visiting our website at www.mosers.org. You may also use this form to request specific information or materials by mail if you do not have access to our website. Steps for completing this request form are outlined below.

1. Complete Section A.
2. Provide requested information to receive a basic benefit estimate including BackDROP (if eligible) in Section B.
 - **Your projected retirement date** is always the **first day** of the calendar month you **begin** receiving retirement benefits.
 - **Your projected termination date** occurs before your retirement date and is the date after which you are no longer an employee of the state as reported by your employer.
3. Provide requested information to include a COLA projection on your benefit estimate in Section C.
 - You will need to select a benefit payment option for your COLA projection. If you do not select a benefit payment option, we will use the Life Income Annuity option.
4. Check out MOSERS' website for additional information or request specific publications be mailed to you in Section D.
 - Set up a password and log into the MOSERS website for instant, secure access to your personal information. Your password allows you to conveniently access everything from your payroll history, beneficiary designations, service history with the state of Missouri, life insurance amounts, and much more. Additionally, once you log into the secure portion of MOSERS' website you can update your personal information and complete many forms including those you will need to retire.
5. Sign and date Section E.
6. Return form to MOSERS.