



## RETIREMENT BENEFIT ESTIMATE REQUEST

**Important** – A member or a designated agent may complete this form. Only one needs to sign. *Please keep in mind that the benefit estimate calculated from this information is just an estimate.* Actual retirement benefits will be based on information the employer provides when a member actually retires.

Members can calculate their own benefit estimate by logging in to their personal account at [www.kpers.org](http://www.kpers.org). The benefit calculator uses a member’s personal data to create quick, accurate estimates.

**Contact Us – toll free:** 1-888-275-5737 • **phone:** 785-296-6166 • **fax:** 785-296-6638  
**e-mail:** [kpers@kpers.org](mailto:kpers@kpers.org) • **web site:** [www.kpers.org](http://www.kpers.org) • **mail:** 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

### Part A – Member Information

- 1. Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- 2. Name (First, MI, Last): \_\_\_\_\_
- 3. Mailing Address: \_\_\_\_\_  
City, State, Zip: \_\_\_\_\_
- 4. Employer: \_\_\_\_\_
- 5. Position: \_\_\_\_\_
- 6. Expected Retirement Date: \_\_\_\_/\_\_\_\_/\_\_\_\_
- 7. Expected Last Day on Payroll: \_\_\_\_/\_\_\_\_/\_\_\_\_
- 8. Is Member Subject to Continuing Contract Law?  No  Yes; Date Contract Expires: \_\_\_\_/\_\_\_\_/\_\_\_\_
- 9. Daytime Telephone Number: (\_\_\_\_) \_\_\_\_\_
- 10. E-mail Address: \_\_\_\_\_

### Part B – Joint Annuitant Information

- 1. Name (First, MI, Last): \_\_\_\_\_
- 2. Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

### Part C – Certification of Final Pay

**Important:** Do not include any incentive pay or additional compensation for unused sick or annual leave amounts listed in 1-3 below.

	Year	Amount
1. Previous Annual Salary Subject to KPERS Contributions:	_____	\$ _____
2. Current Annual Salary Subject to KPERS Contributions: <i>If retiring in current year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
3. Next Annual Salary Subject to KPERS Contributions: <i>If retiring in next year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
4. Lump-Sum Payment for Sick and/or Annual Leave: <i>Paid when member leaves work, not included in above salaries.</i>	_____	\$ _____

“I certify that the information provided on this form is true to the best of my knowledge. I understand that the retirement estimate calculated with this information is just an estimate. KPERS will calculate the actual benefit at retirement using verified final amounts and pay the benefit according to applicable laws and regulations.”

Member Signature: \_\_\_\_\_ Month/Day/Year: \_\_\_\_/\_\_\_\_/\_\_\_\_

Designated Agent Signature: \_\_\_\_\_ Month/Day/Year: \_\_\_\_/\_\_\_\_/\_\_\_\_

## **Completing the KPERS-15E Benefit Estimate Request**

- You can request a benefit estimate up to one year (or more – see below) in advance of retirement using this form.
- Employees with membership dates PRIOR to August 1, 1993 or you were in your one year waiting period prior to Aug. 1, 1983 should complete this form for a more accurate retirement estimate. To find your membership date:
  - Log onto your account at [www.kpers.org/mykpers](http://www.kpers.org/mykpers), or;
  - Contact KPERS at 888-275-5737, or;
  - Contact Michelle Spreer at 785-832-3204
- Employees with membership dates AFTER August 1, 1993 can calculate your benefit estimate through your personal KPERS account at [www.kpers.org/mykpers](http://www.kpers.org/mykpers). This is the easiest and quickest way to get your estimate.

### **Part A**

- #'s 1-5 – Current information
- #6 – Retirement date is always the 1<sup>st</sup> of the month following last day on payroll.
- #7 – Expected last day on payroll is the last date that you will physically be at work. This date is extremely important, especially for employees with membership dates prior to August 1, 1993. Contact KPERS or Michelle Spreer to help you determine what the last day worked should be.

**Part B** – Spouses information. KPERS is required to provide estimates on joint survivor benefits if you are legally married.

### **Part C**

- #1 – Leave blank (KPERS has this info OR see note in red below).
- #2 – Estimated salary for the year we are currently in. If your expected retirement date is in the current payroll year, estimate your wages only up through your last day worked.
- #3 – Estimated salary for the following year. If your expected retirement date will be in the following payroll year, estimate wages only up through your last day worked.
- **NOTE: If your expected retirement date is more than one year away, move the dates and wages up one line (see examples on next page).**
- #4 – Include payout amounts ONLY if your membership date is prior to August 1, 1993 or if you started your one-year waiting period prior to August 1, 1993.
  - Payout amounts for accrued time include 25% of your sick leave balance, 100% of vacation balance, and if applicable, comp time, wellness and personal days, Kelly days (Fire) and physical fitness days (Police).
  - The total number of hours being paid out is multiplied by your estimated hourly rate at time of expected retirement.

**Example 1: Last day worked June 30, 2017 (July 1<sup>st</sup> retirement date)**

	Year	Amount
1. Previous Annual Salary Subject to KPERS Contributions:	<input type="text"/>	\$ <input type="text"/>
2. Current Annual Salary Subject to KPERS Contributions: <i>If retiring in current year, include only compensation through estimated last day on payroll.</i>	2016	\$ 51,000.00
3. Next Annual Salary Subject to KPERS Contributions: <i>If retiring in next year, include only compensation through estimated last day on payroll.</i>	2017	\$ 26,000.00
4. Lump-Sum Payment for Sick and/or Annual Leave: <i>Paid when member leaves work, not included in above salaries.</i>	<input type="text"/>	\$ 13,000.00

**Example 2: Last day worked June 30, 2018 (July 1<sup>st</sup> retirement date)**

	Year	Amount
1. Previous Annual Salary Subject to KPERS Contributions:	2016	\$ 50,000.00
2. Current Annual Salary Subject to KPERS Contributions: <i>If retiring in current year, include only compensation through estimated last day on payroll.</i>	2017	\$ 51,000.00
3. Next Annual Salary Subject to KPERS Contributions: <i>If retiring in next year, include only compensation through estimated last day on payroll.</i>	2018	\$ 26,000.00
4. Lump-Sum Payment for Sick and/or Annual Leave: <i>Paid when member leaves work, not included in above salaries.</i>	<input type="text"/>	\$ 13,000.00

- This is only an estimate. Actual monthly retirement benefits are calculated by KPERS once all of your wages are reported by the City upon termination of employment.
- Contact Michelle Spreer at 785-832-3204 with questions about completing this form. A designated agent signature is NOT required.
- Estimates will be mailed to your home address in approximately 2 to 4 weeks from the date the request was submitted.
- Once you receive your estimate, contact Michelle Spreer to discuss your retirement options.