

Dear Member:

Please complete and return the following information to this office to obtain an estimate of your retirement benefits. Upon receipt of this information, the Consolidated Public Retirement Board will prepare an estimate of your retirement benefits.

*Important Notice: An estimate is merely advisory in nature and is not binding upon either the Retirement Board or the Member.*

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**BENEFIT ESTIMATE REQUEST**  
**WEST VIRGINIA TEACHERS' RETIREMENT SYSTEM (TRS)**

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

Address \_\_\_\_\_ SS# \_\_\_\_\_

City/State \_\_\_\_\_ Zip Code \_\_\_\_\_

Home Phone# \_\_\_\_\_ Work Phone# \_\_\_\_\_ Current Employer \_\_\_\_\_

I anticipate my last day of work will be \_\_\_\_\_

Name of Beneficiary \_\_\_\_\_ SS# \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_

Have you purchased or reinstated service within the last year?     Yes     No

Do you have military service?     Yes     No    **If yes, please enclose a copy of your DD-214 form.**

Has your military service been counted in another State's Retirement System?     Yes     No

Are you currently serving as an elected public official?     Yes     No

Do you currently have an outstanding loan with the Teachers' Retirement System?     Yes     No

If yes, you will have **two options** that you may choose at the time of retirement in the event you have an outstanding loan:

1. **Pay in full the balance of the loan plus accrued interest before the effective date of my retirement.**
2. **Permanently have my monthly annuity option actuarially reduced by the amount equal to the balance owing on the loan plus accrued interest.**

Are you covered under PEIA?     Yes     No    **Please enclose a copy of your birth certificate.**

I wish for my current salary in the amount of \$ \_\_\_\_\_ to be used in calculating my benefit estimate.

If you are interested in converting sick/annual leave for service credit: Total Number of days \_\_\_\_\_

**Please note this estimate request form may not be used to effect a change of beneficiaries. Please update your beneficiary information.**

**\*\*\*In preparing for retirement, please keep in mind that processing time for computing a retirement annuity may take up to eight weeks after your effective date of retirement, which is the first day of the following month that you are removed from the payroll.\*\*\***

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

COMMENTS \_\_\_\_\_

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