

5 N 5th Street  
 Harrisburg PA 17101-1905  
 Toll-free: 1.888.773.7748  
[www.psers.state.pa.us](http://www.psers.state.pa.us)  
 Fax: 717.772.3860  
 PSRS-1309 (04/2016)

## Request for Recalculation Estimate Due to Change in Marital Status or Death of Survivor Annuitant



Mail Center

**Complete this form only if your current retirement option is a Survivor Option (Option 2, Option 3, or Special Option 4 - Joint and Survivor Benefit).**

Do not use this form if your current retirement option is any other option (e.g., Maximum Single Life Annuity or Option 1) because you are not eligible to change your retirement option. You may, however, change your named beneficiaries at any time by submitting a *Nomination of Beneficiaries* (PSRS-187) form, available on the PSERS website [www.psers.state.pa.us](http://www.psers.state.pa.us).

The Retirement Code states that if a member designated a survivor annuitant at the time of retirement, he or she may nominate a new survivor annuitant or elect a new retirement option if one of the following occurs:

- ✓ The survivor annuitant predeceases the member.
- ✓ The member is divorced or married subsequent to the election of the option.

In such cases, the annuity may be recomputed to be actuarially equivalent to the annuity in effect immediately prior to the recomputation.

If you elect to change your retirement option or survivor annuitant, your monthly benefit will be recalculated based on your request (e.g., new option, new survivor annuitant, and age(s) at the time of the change). **It is likely that your current monthly benefit will be reduced in this recalculation.**

The information you provide on the *Request for Recalculation Estimate* (PSRS-1309) is used to calculate your benefit estimate. If PSERS does not receive accurate information, your benefit estimate may not reflect 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.

The estimate request will not be processed until the required documentation (e.g., Death Certificate) specified in *B - Estimate Request Information* has been provided to PSERS.

### Survivor Information

Per Internal Revenue Service regulations, if you are age 70.5 or older, you may not select a new survivor annuitant unless that survivor annuitant is your spouse. If you are under 70.5 and choose a non-spouse as your new survivor annuitant, there may be a percentage cap on the amount that he or she may receive.

The Retirement Code requires that the value of the annuity payable to the member after recalculation must not be less than 50% of the Present Value of the member's Maximum Single Life Annuity.

### If You Have Questions about Your Retirement Estimate

After you receive the retirement estimate from PSERS, please review the figures used for the calculation. If you have any questions, contact the PSERS Member Service Center at: 1.888.773.7748. You may also email PSERS at **ContactPSERS@pa.gov**.

5 N 5th Street  
 Harrisburg PA 17101-1905  
 Toll-free: 1.888.773.7748  
 www.psers.state.pa.us  
 Fax: 717.772.3860  
 PSRS-1309 (04/2016)

## Request for Recalculation Estimate Due to Change in Marital Status or Death of Survivor Annuitant



Mail Center

**Complete and submit this form if you wish to receive an estimate of your available alternatives for changing your survivor annuitant and/or Retirement Option.**

**Note: This form will only be accepted by PSERS if you retired with a survivor option and your survivor annuitant has died or your marital status has changed.**

### A Member Information

<b>Member Name</b>	
<b>Social Security Number</b>	
<b>Gender</b>	
<b>Date of Birth</b>	

<b>Member Address</b>	
<b>Apt# or Suite</b>	
<b>Mailing Address</b>	
<b>City</b>	
<b>State &amp; ZIP Code</b>	
<b>Daytime Phone</b>	(    )
<b>Evening Phone</b>	(    )
<b>Email</b>	

### B Estimate Request Information

**Reason for Request (check one):**

**Death of the previously designated Survivor Annuitant.** A copy of the Death Certificate is required before an estimate can be calculated. Please submit it with this form if it was not previously submitted.

**Divorce from the previously designated Survivor Annuitant.** A copy of the Divorce Decree and Property Settlement Agreement are required before an estimate can be calculated. Please submit them with this form if they were not previously submitted.

**Marriage or Remarriage.** A copy of the Marriage Certificate is required before an estimate can be calculated. Please submit it with this form if it was not previously submitted.

**New Survivor Annuitant / Beneficiary Information:**  
 Complete **all three** fields below if you wish to have Survivor options included in your estimate. If you leave them blank, PSERS will assume that you do not want to receive estimate information for Joint and Survivor options. You may name only one Survivor Annuitant.

<b>New Survivor Annuitant's Gender</b> <input type="checkbox"/> Male <input type="checkbox"/> Female	<b>Relationship to New Survivor Annuitant</b> <input type="checkbox"/> Spouse <input type="checkbox"/> Non-Spouse	<b>New Survivor Annuitant's Date of Birth</b>
---	--	---

<b>Member Signature</b>	<b>Date</b>
-------------------------	-------------

**Upon completion, forward or fax this form to:**

**PSERS Exception Processing Unit  
 5 N 5th Street  
 Harrisburg PA 17101-1905  
 FAX: 717.772.3860**