



# Retirement Application Kit

## Before you Begin

- **You must contact PERSI** for a retirement estimate **before** completing and submitting these forms. The estimate from your annual statement is **not** acceptable for this purpose. **If you do not have an estimate from PERSI, PERSI cannot accept your application** and you may have to fill out the forms again.

## Instructions

1. If you do not have a retirement estimate from PERSI, call PERSI to request an estimate:
  - Call 334-3365 from within the Boise calling area.
  - Call 800-451-8228 from outside the Boise calling area.
2. Once you have received your estimate from PERSI, fill out the forms in this kit. (Some forms in this kit may not apply in your case. You may skip a form if it does not apply.)
3. Enter the estimate date from your PERSI Estimate in the "PERSI Estimate Information" section below.
4. Complete the "Member Information" section below.
5. Go to the next page and follow the instructions provided with each form.
6. PERSI requires a certified copy of your birth certificate to process your retirement. See the attached "Alternate Evidence for Date of Birth" if you cannot produce a copy of your birth certificate.
7. The "Effective Date of Retirement" will be the first day of the month.

PERSI Estimate Information	
Date of PERSI Estimate (mm/dd/yyyy): _____	

Member Information			
Name – First, Middle, Last			Social Security Number
<b>Mailing Address</b>	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)	Email Address		Date of Birth – mm/dd/yyyy
Name of Last PERSI Employer	Effective Date of Retirement - mm/01/yyyy)		<b>Marital Status</b> <input type="checkbox"/> Single <input type="checkbox"/> Married

Package contains: RS121, RS448, RS322, RS113, RS115, RS160, AltDOB, AltSSN.





# Application for Retirement

## Purpose of the Form

- Use this form to apply for retirement, and to name a contingent annuitant if you choose Option 1, 2, 4A, or 4B.

## Instructions

- Read "About Form RS121," attached.

Member Information			
Name – First, Middle, Last			Social Security Number
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)		Email Address	Date of Birth – mm/dd/yyyy
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married		Date of Termination – mm/dd/yyyy	
Name of Last PERSI Employer		Effective Date of Retirement - mm/01/yyyy	

Retirement Benefit Payment Options
<input type="checkbox"/> _____ Check and initial here if this is a change from a previous application for retirement.
Choose <b>one</b> option and then initial the checkbox next to your choice. Regular Retirement, Option 1 and Option 2 are available to all retiring PERSI members.
<input type="checkbox"/> _____ <b>Regular Retirement.</b> A regular benefit payment based on my life only and terminating at my death with no further benefit payment. <input type="checkbox"/> _____ <b>Option 1 – 100% Contingent Annuitant.</b> A reduced benefit payment to me as long as I live, and then the same benefit payment to my surviving contingent annuitant as long as he or she lives. <input type="checkbox"/> _____ <b>Option 2 – 50% Contingent Annuitant.</b> A reduced benefit payment to me as long as I live, and then one-half of the benefit payment to my surviving contingent annuitant as long as he or she lives.
Option3, Option 4A, and Option 4B are <b>only</b> available to retiring PERSI members who have not reached Social Security Full Retirement Age (SSFRA) (Age 65 – 67, depending on birthdate).
<input type="checkbox"/> _____ <b>Option 3 – Member Lifetime Only.</b> An increased benefit payment until Social Security Normal Retirement Age (SSNRA) (65 to 67, depending on birthdate) and a reduced benefit payment thereafter. The after-SSNRA benefit payment will be my initial PERSI benefit payment less the Social Security estimate increased by Cost of Living Adjustments (COLAs). <input type="checkbox"/> _____ <b>Option 4A – 100% Contingent Annuitant.</b> A reduced Option 3 benefit payment to me as long as I live, and then the same benefit payment to my surviving contingent annuitant as long as he or she lives. <input type="checkbox"/> _____ <b>Option 4B – 50% Contingent Annuitant.</b> A reduced Option 3 benefit payment to me as long as I live, and then one-half of the benefit payment to my surviving contingent annuitant as long as he or she lives.

Application for Retirement - continued	
Name – First, Middle, Last	Social Security Number

Contingent Annuitant Selection (Complete only if Option 1, 2, 4A, or 4B are selected)			
Name – First, Middle, Last		Social Security Number	
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Relationship to Member		Date of Birth - mm/dd/yyyy	

Member Acknowledgment	
<p>I have been provided an estimate of the dollar values of the retirement allowances available to me and chosen the retirement allowance indicated above. I understand that I can change my retirement option only by notifying PERSI in writing no later than five business days after the receipt of my first retirement benefit payment. After this period, I cannot change options after I retire unless either I was (1) not married at the time of my retirement or (2) I elected a contingent annuitant (CA) option, named my spouse as CA, and my spouse predeceased me. Under either of these circumstances, if I later marry, I can choose a CA option at that time and name my spouse as CA no later than one year after marriage.</p> <p>If I selected Option 1, 2, 4A, or 4B, I appoint the individual named as my contingent annuitant to receive an allowance after my death.</p> <p>I further acknowledge that in order to process my retirement application, PERSI will contact my current employer to confirm my separation from service and, to the extent my permission for such contact is required by law, I hereby give such consent.</p>	
Signature	Date

Notary Public for Member	
State of _____, County of _____ On this _____ day of _____, _____, before me _____, a notary public, personally appeared _____, personally known to me to be the person whose name is subscribed to the within instrument, and acknowledged to me that he/she executed the same.	Seal
Notary Public Signature	
My Commission Expires On	

Application for Retirement - continued	
Name – First, Middle, Last	Social Security Number

Spouse Acknowledgment (Required if married)	
I am the spouse of the member named above. I understand and give my consent to the retirement option and contingent annuitant (if named) indicated above.	
Name – First, Middle, Last	
Signature	Date

Notary Public for Spouse	
State of _____, County of _____ On this _____ day of _____, _____, before me _____, a notary public, personally appeared _____, personally known to me to be the person whose name is subscribed to the within instrument, and acknowledged to me that he/she executed the same.	Seal
Notary Public Signature	
My Commission Expires On	

# About Form RS121

## Instructions

- Complete the form and sign in blue or black ink.
- Do not use correction fluid (whiteout) on this form to correct errors, start over with a new form.
- Complete the **Member Information** and **Retirement Benefit Payment Options** sections.
- If you are not yet Social Security Full Retirement Age (age 65 to age 67 or older depending on your birthdate) you may choose from all Retirement Options.
- If you have achieved the Social Security Full Retirement Age (you are age 65 to 67 or older depending on your birthdate) you may only choose from the Regular Retirement Option or Options 1 and 2. Options 3, 4A and 4B are **not** available to you.
- If you choose Option 1, 2, 4A, or 4B, complete the **Contingent Annuitant Selection** section to name the individual who is to receive your benefit payment after your death. Attach a certified copy of the contingent annuitant's birth certificate and Social Security card.
- To verify your Social Security Full Retirement Age please contact the Social Security Administration or go to the Social Security Administration website at: <http://www.ssa.gov>
- Complete the **Member Acknowledgment** section before a Notary Public. Have the Notary Public complete the **Notary Public for Member** section.
- If you are married, your spouse must complete the **Spouse Acknowledgment** section before a Notary Public regardless of your Retirement Option selection. Have the Notary Public complete the **Notary Public for Spouse** section.
- Keep a copy for your records and send the original form to PERSI.

## Benefit Payment Information

- Retirement becomes effective the first day of the month that you choose.
- Regardless of the option you choose, the balance of your account will be paid to your beneficiary in the event of your death if the total of payments to you and your contingent annuitant are less than your accumulated contributions and interest at the time of retirement.
- A "pop-up" provision in the contingent annuitant benefit payment options converts an Option 1 or Option 2 benefit payment to an unreduced benefit payment if your contingent annuitant dies first. This feature applies only if your final contributions from salary were on or after July 1, 1992, and your retirement was effective October 1, 1992, or later.



# Direct Deposit Authorization

## Purpose of the Form

- Use this form to authorize direct deposit of your PERSI benefit payments to a financial institution.

## Instructions

- Complete the form and sign in blue or black ink. A designated representative may sign if PERSI has a valid RS113 *PERSI Durable Limited Power of Attorney* on file.
- Attach a **voided check** for a checking account. For a savings account attach a document that shows (1) a valid Transit and American Banking Association number of the financial institution and (2) the number of the checking or savings account that you want to use for the direct deposit.
- Send the form to PERSI.

## Changing Accounts

- Consider maintaining accounts at both your old and new financial institutions until the transaction is complete (that is, until the new financial institution receives its first benefit payment). The change you are requesting could take up to 30 days to become effective.

Member Information			
Name – First, Middle, Last			Social Security Number
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)		Email Address	

Financial Institution Information		
Name of Financial Institution		
Account Information (check one)	<input type="checkbox"/> Checking (Attach a voided check for this account.)	<input type="checkbox"/> Savings (Attach a document that shows the routing number of the financial institution and the account number of the savings account.)

Member Acknowledgment	
<p>PERSI is authorized and directed to deposit the net amount of my benefit payments by electronic funds transfer directly to my account at the financial institution named above. This supersedes any previous instructions until canceled by me in writing.</p> <p>I authorize and direct the financial institution to immediately refund any overpayments to PERSI (including any benefit payments made on or after my death), and to charge the same to the named account. PERSI's certification of overpayment shall be sufficient evidence of an overpayment. If the funds remaining in the account are not sufficient to permit the financial institution to fully refund overpayments, I authorize and direct the financial institution to provide to PERSI all information related to the account, including transactions since the first of the month in which my death occurs, and the names and addresses of all joint account holders and any individuals authorized to withdraw funds from the designated account.</p> <p>I agree that jurisdiction over any collection actions related to the recovery of any funds transferred to the designated account by PERSI will be exclusively in the courts of the State of Idaho.</p>	
Signature	Date







# Federal and Idaho Tax Withholding

## Purpose of the Form

- Use this form to indicate your withholdings from your PERSI benefit payment for federal and/or Idaho taxes.

## Instructions

- Read "About RS322," attached.

Member Information			
Name – First, Middle, Last			Social Security Number
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)			Type of Change <input type="checkbox"/> Begin my withholdings <input type="checkbox"/> Change my withholdings

Federal Tax Withholding Options (Choose one)
<input type="checkbox"/> Do <b>not</b> withhold federal tax.
<input type="checkbox"/> Withhold a flat amount each month for federal tax. Flat amount: _____ Beginning date: _____ (mm/dd/yyyy)
<input type="checkbox"/> Calculate my monthly federal tax withholding using IRS tax tables, and withhold that amount each month for federal tax. <input type="checkbox"/> Married Number of exemptions: _____ <input type="checkbox"/> Single Beginning date: _____ (mm/dd/yyyy) <b>Optional:</b> Withhold the calculated amount <b>plus</b> \$ _____ for federal tax. Examples: Married claiming 2 exemptions, Married claiming 4 exemptions plus \$50.00.

State of Idaho Tax Withholding Options (Choose one)
<input type="checkbox"/> Do <b>not</b> withhold Idaho tax.
<input type="checkbox"/> Withhold a flat amount each month for Idaho tax. Flat amount: \$ _____ Beginning date: _____ (mm/dd/yyyy)
<input type="checkbox"/> Calculate my monthly Idaho tax withholding using Idaho tax tables, and withhold that amount each month for Idaho tax. <input type="checkbox"/> Married Number of exemptions: _____ <input type="checkbox"/> Single Beginning date: _____ (mm/dd/yyyy) <b>Optional:</b> Withhold the calculated amount <b>plus</b> \$ _____ for Idaho tax. Examples: Married claiming 2 exemptions, or Married claiming 4 exemptions plus \$50.00.

Member Acknowledgment	
Signature	Date

# About Form RS322

## Instructions

Complete the form and send it to PERSI.

## Notes About Withholding

- Generally your PERSI benefit is taxable income. You can have federal and/or Idaho taxes withheld from your monthly PERSI benefit.
- If you provide no instructions regarding your federal tax withholding, PERSI must withhold federal tax at the rate for a married individual claiming 3 exemptions.
- You are liable for the payment of taxes, interest, and penalties if your estimated tax and withholding payments are not adequate.
- Idaho tax withholding from your PERSI benefit is optional.
- The withholdings you indicate on this form replace your current withholdings.



# PERSI Durable Limited Power of Attorney

## Purpose of the Form

- Use this form to designate another individual as your Attorney-in-Fact to conduct certain business with PERSI on your behalf.

## Instructions

- Complete the form and sign in blue or black ink.
- Read "Important Information About Form RS113," on page 3.
- Complete the **Member Information** on page 1.
- Complete the **Power of Attorney Appointment and Certification** section on page 2. You must write your name in both the Member Name Section of page 2 and the Member Information section on page 1.
- Verify all sections are complete and selections are initialed in ink before signing.
- Sign the **Power of Attorney Appointment and Certification** section in blue or black ink before a Notary Public. Have the Notary Public complete the **Notary Public for Member** section.
- Send the form directly to PERSI.

Member Information			
Name – First, Middle, Last		Social Security Number	
Residence Address	Street		
	City	State	Zip code
Mailing Address (if different)	Street or P.O. Box		
	City	State	Zip code
Daytime Phone Number (include area code)		Email Address	

This section intentionally left blank

**PERSI Durable Limited Power of Attorney - continued**

**Attorney-in-Fact Appointment and Certification**

**Member Name – First, Middle, Last**

I (the principal) hereby make, constitute, and appoint the following my true and lawful Attorney-in-Fact to act for me with respect to my PERSI Base Plan and PERSI Choice Plan (if any) in accordance with the Idaho Uniform Power of Attorney Act, chapter 12, title 15, Idaho Code. Further, PERSI may, upon request by the Attorney-in-Fact, release any and all information to said Attorney-in-Fact concerning my account(s).

My Attorney-in Fact MAY NOT do any of the following specific acts for me UNLESS I have INITIALED, in ink, the specific authority listed below:

- Create or change a beneficiary designation
- Authorize another person to exercise the authority granted under this power of attorney
- Waive my right to be a beneficiary

An attorney-in-fact who is not my ancestor, spouse or descendant MAY NOT use my property to benefit the Attorney-in-Fact or a person to whom the agent owes an obligation of support unless I have included that authority in the Special Instructions.

SPECIAL INSTRUCTIONS (optional – must be completed in ink):

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**This power of attorney shall not be affected by my subsequent disability or incapacity, and is valid until I notify PERSI in writing to revoke it. This power of attorney revokes any previous power of attorney designations related to PERSI.**

**PERSI may rely upon the validity of this power of attorney or a copy of it unless PERSI knows it is terminated or invalid. (Verify all selections in this section have been completed before signing)**

<b>Name of Designated Attorney-in-Fact</b>	<b>Relationship to Member</b>
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<b>Mailing Address</b>	<b>Street or P.O. Box</b>		
	<b>City</b>	<b>State</b>	<b>Zip Code</b>

**Daytime Phone Number (include area code)**

<b>Member Signature</b>	<b>Date</b>
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**Notary Public for Member**

<p>State of _____, County of _____</p> <p>On this _____ day of _____, _____, before me _____, a notary public, personally appeared _____, personally known to me to be the person whose name is subscribed to the within instrument, and acknowledged to me that he/she executed the same.</p> <p><b>Notary Public Signature</b></p> <p><b>My Commission Expires On</b></p>	<p><b>Seal</b></p>
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# Important Information About Form RS113

## PERSI Durable Limited Power of Attorney

The *PERSI Durable Limited Power of Attorney* form lets you assign to someone else the right to make certain decisions and to act regarding your account(s). You should select someone you trust to serve as your Attorney-in-Fact. The Attorney-in-Fact's authority will continue until your death unless you revoke the power of attorney or the Attorney-in-Fact resigns. Unless you state otherwise in the Special Instructions, your Attorney-in-Fact is entitled to reasonable compensation. This form provides for the designation of one (1) Attorney-in-Fact. If you wish to name more than one Attorney-in-Fact, you may name a Co-Attorney-in-Fact in the Special Instructions. Co-Attorneys-in-Fact are not required to act together unless you include that requirement in the Special Instructions.

You may change your designated Attorney-in-Fact at any time by completing a new form and submitting it to PERSI. If you wish to revoke a *PERSI Durable Limited Power of Attorney*, you must do so in writing to PERSI.

**This *PERSI Durable Limited Power of Attorney* only applies to PERSI matters.** PERSI has provided this form as a convenience to its members. If it does not meet your needs, or if you have questions about the power of attorney or the authority you are granting, you should seek legal advice.

### Effective Upon Receipt

This power of attorney becomes effective immediately unless you state otherwise in the Special Instructions and is durable/remains valid notwithstanding your subsequent disability or incapacity. If you do not provide for a different effective date, as soon as PERSI receives this *Durable Limited Power of Attorney*, properly signed and notarized, the Attorney-in-Fact is authorized to act on an account.

**Note:** The member need not be incapacitated for the Attorney-in-Fact to act pursuant to this *Durable Limited Power of Attorney*.

### False Claims

It is against the law in the State of Idaho for any individual (including PERSI members, spouses, beneficiaries, or family) to knowingly make a false claim for benefits or money from PERSI.





# Beneficiary Designation

## Purpose of the Form

- Use this form to designate beneficiaries to receive your PERSI Base Plan and Choice 401(k) Plan death benefits.

## Instructions

- Read "About Form RS115," attached.

Member Information			
Name – First, Middle, Last			Social Security Number
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)	Email Address		Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.
				.0%	<input type="checkbox"/> Check this box and go to page 2.

Member Acknowledgment	
I understand the instructions and information under "About Form RS115." I revoke all previous PERSI beneficiary designations and request that any PERSI benefits payable after my death be made as indicated herein. I may change this designation by filing a new form. This designation applies to my PERSI Base and Choice 401(k) Plan accounts.	
Signature	Date

**Beneficiary Designation - continued**

<b>Name – First, Middle, Last</b>	<b>Social Security Number</b>
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**Custodian Nominations for Minor Beneficiaries under the Idaho Uniform Transfers to Minors Act**

- Use this section to nominate custodians and substitute custodians for minor beneficiaries under the Idaho Uniform Transfers to Minors Act. Attach a copy of this page if nominating custodians for more than 4 minor beneficiaries.

**Instructions**

- Write the minor beneficiary's name in the top box.
- Write the custodian's name, Social Security number, address, and telephone number in the appropriate boxes. You can nominate a substitute custodian to serve in the event the nominated custodian is unable. List each minor beneficiary separately, even if you are nominating the same custodian for all minor beneficiaries.

<b>Minor Beneficiary Name:</b>			
<b>Custodian Information</b>		<b>Substitute Information</b>	
<b>Name:</b>		<b>Name:</b>	
<b>SSN:</b>		<b>SSN:</b>	
<b>Address:</b>		<b>Address:</b>	
<b>City, St, Zip:</b>		<b>City, St, Zip:</b>	
<b>Telephone:</b>		<b>Telephone:</b>	

<b>Minor Beneficiary Name:</b>			
<b>Custodian Information</b>		<b>Substitute Information</b>	
<b>Name:</b>		<b>Name:</b>	
<b>SSN:</b>		<b>SSN:</b>	
<b>Address:</b>		<b>Address:</b>	
<b>City, St, Zip:</b>		<b>City, St, Zip:</b>	
<b>Telephone:</b>		<b>Telephone:</b>	

<b>Minor Beneficiary Name:</b>			
<b>Custodian Information</b>		<b>Substitute Information</b>	
<b>Name:</b>		<b>Name:</b>	
<b>SSN:</b>		<b>SSN:</b>	
<b>Address:</b>		<b>Address:</b>	
<b>City, St, Zip:</b>		<b>City, St, Zip:</b>	
<b>Telephone:</b>		<b>Telephone:</b>	

<b>Minor Beneficiary Name:</b>			
<b>Custodian Information</b>		<b>Substitute Information</b>	
<b>Name:</b>		<b>Name:</b>	
<b>SSN:</b>		<b>SSN:</b>	
<b>Address:</b>		<b>Address:</b>	
<b>City, St, Zip:</b>		<b>City, St, Zip:</b>	
<b>Telephone:</b>		<b>Telephone:</b>	



# About Form RS115

## Instructions

- 1 Complete the form and sign in blue or black ink.
- 2 **Use whole percentages only.**
- 3 If more space is needed, attach an additional signed and dated sheet of paper.
- 4 If any designated beneficiary is a minor, complete page 2 if you choose to nominate an adult custodian to receive the funds for the minor. PERSI cannot pay a death benefit directly to a minor beneficiary.
- 5 Send the form to PERSI.

**Note:** The form is not valid unless signed, dated, and on file with PERSI.

## Types of Beneficiaries

- **Primary beneficiary or beneficiaries.** The first person or persons to receive death benefits when you die. If you select one person only, he or she receives 100% of the benefits.
- **Secondary beneficiary or beneficiaries.** Person or persons to receive death benefits if no primary beneficiary or beneficiaries are alive when you die.
- **Default beneficiary.** If PERSI does not have a beneficiary designation on file, death benefits are paid by law to the following: (1) To your surviving spouse. (2) If you have no surviving spouse, to your estate. If you agree with this default distribution and you have not previously submitted a beneficiary designation form, you do not need to designate a beneficiary or submit this form. However, payment of death benefits could be delayed if PERSI has no designation on file.

## Notes About Designating Beneficiaries

- Percentages must be in whole numbers. Do **not** use partial numbers. For example, use 33% not 33 $\frac{1}{3}$ %.
- Choose your beneficiaries carefully. Your PERSI funds might be your largest financial asset.
- If you select two or more people as primary or secondary beneficiaries, indicate what percentage each is to receive (the percentages must equal 100%).
- You must list your children separately.
- If you are designating one or more minors as beneficiary, you should specify how you want your death benefit transferred if you die before the beneficiary reaches legal age of majority. PERSI cannot disperse the money to a minor, so if you don't nominate a custodian on this form, a court may have to appoint an adult to serve as conservator of the funds. This form provides an easy and inexpensive way to transfer death benefits to a minor through the Idaho Uniform Transfers to Minors Act (UTMA). This law enables you to nominate a custodian, and substitute custodian, for your minor beneficiary, and authorizes PERSI to pay your death benefit to the custodian. To nominate a custodian for a minor beneficiary, fill out page 2 of this form.
- If you use the UTMA to nominate a custodian for your minor beneficiary, be aware that the legal age of majority under the UTMA is 21, even though the statutory age of majority in Idaho is 18. If you die before your beneficiary is 21 years of age, the money will go to and remain in the custodian's care until the beneficiary reaches age 21.
- Always provide full names (Mary Elizabeth Smith, **not** Mary Smith). For a married woman, use her full name (Mary Elizabeth Smith, **not** Mrs. Bob Smith). Include the relationship to you.
- This beneficiary designation is for PERSI Base Plan and Choice 401(k) Plan death benefits **only**. Any designations you make for a will or an insurance policy do not substitute for the PERSI beneficiary designation.
- Submit a new *Beneficiary Designation* (RS115) to PERSI if your marital status changes.
- Complete a *Member Name Change* (RS111) if your name changes. If you are an active member, (working for a PERSI employer and making contributions) give the form to your payroll clerk. If not, send the form to PERSI.
- Percentages must be in whole numbers. Do **not** use partial numbers. For example, use 33%, not 33 $\frac{1}{3}$ %.
- You can change your designations at any time by submitting a new *Beneficiary Designation* (RS115) to PERSI.
- If you make an error, initial and date any corrections.

### Minor Children, Trusts, Wills, and Charities as Beneficiaries

- **Minor children.** To designate a minor child as a primary or secondary beneficiary, you should consider transferring the money to a custodian for the child under the provisions of the Idaho Uniform Transfers to Minors Act (UTMA). Using PERSI form RS115 page 2 meets the UTMA requirements.
- **Trusts.** If you want to designate your Living Trust, show the date of the trust agreement and the name(s) of the Trustee(s). If a bank or trust company is the Trustee, attach a separate document containing the Trustee's address. Provide PERSI with a copy of the trust's registration, if available. The trust must have a tax ID number.
- **Wills.** Write "the Executor of my Estate" or "the Administrator of my Estate" to designate your estate as beneficiary. Do not name the executor, because the executor will be appointed later by the court.
- **Charities.** You can name a specific charity as beneficiary. For more information about payment of death benefits to charities, PERSI recommends that you consult with a qualified attorney.

### Example 1

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
Phillip Lee Thompson	000-01-0011	07-11-1937	Spouse	100.0%	<input type="checkbox"/> Check this box and go to page 2.
					<input type="checkbox"/> Check this box and go to page 2.

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
John Allen Smith	000-08-0025	01-09-1997	Son	80.0%	<input type="checkbox"/> Check this box and go to page 2.
Rebecca Joan Smith	000-02-0220	01-02-1958	Sister	20.0%	<input type="checkbox"/> Check this box and go to page 2.

### Example 2

Primary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
Sally Jones	000-03-0033	08-21-1994	Daughter	34.0%	<input checked="" type="checkbox"/> Check this box and go to page 2.
Alice Jones	000-04-0044	11-14-1991	Daughter	33.0%	<input checked="" type="checkbox"/> Check this box and go to page 2.
Andrew Jones	000-05-0055	02-29-1987	Son	33.0%	<input type="checkbox"/> Check this box and go to page 2.

Secondary Beneficiary or Beneficiaries					
Name	Social Security or Tax ID Number	Date of Birth	Relationship to You	Benefit %	Nominate a custodian under the Idaho UTMA
The administrator of my estate			Estate	100.0%	<input type="checkbox"/> Check this box and go to page 2.
					<input type="checkbox"/> Check this box and go to page 2.



# Unused Sick Leave Deduction Authorization

## Purpose of the Form

- Use this form to authorize PERSI to deduct applicable employer-maintained insurance premiums from your unused sick leave account and/or your monthly PERSI benefit.

## Instructions

Complete the form in blue or black ink.

Send completed form to PERSI.

**\*Note:** This is not an insurance enrollment form. You must enroll through your employer for employer-maintained insurance before the premium payment election selected on this form will take effect.

Member Information			
Name – First, Middle, Last			Social Security Number
Mailing Address	Street or P.O. Box		
	City	State	Zip Code
Daytime Phone Number (include area code)		Email Address	

Deduction Elections
<input type="checkbox"/> <b>Election 1.</b> Deduct my insurance premiums from my unused sick leave account. <b>Result:</b> After the account is depleted, your insurance premiums will be deducted from your monthly benefit.
<input type="checkbox"/> <b>Election 2.</b> Divide my unused sick leave account into equal monthly payments to be deducted from my unused sick leave account, and deduct the remaining premium payment amount from my monthly benefit check. Flat monthly amount to be deducted from my unused sick leave account: \$_____ <b>Result:</b> After the account is depleted, the full amount of your insurance premiums will be deducted from your monthly benefit check.
<input type="checkbox"/> <b>Election 3.</b> Use a percentage amount to be deducted from my unused sick leave account, and deduct the remaining premium payment amount from my monthly benefit check. Percentage of total insurance premium payment to be deducted from my unused sick leave account: _____ % <b>Result:</b> This percentage will be used for all eligible insurances you carry. After the entitlement is depleted, the full amount of your insurance premiums will be deducted from your monthly benefit check.
<b>Election Change</b> <ul style="list-style-type: none"> <li>• You cannot change an election except in the event of a significant life event, such as death of a dependent, marriage, divorce, disability or birth/adoption of a child. <b>*Note:</b> A premium increase is not a significant life event.</li> <li>• If you do not make an election, you will be deemed to have chosen Election 1.</li> <li>• When your unused sick leave funds are depleted if you do not want the full premium deducted from your monthly benefit you must contact your insurance carrier to make other payment arrangements or cancel your coverage.</li> </ul>

Member Acknowledgment		
<p>I understand that completion of this form <b>does not</b> automatically enroll me in my employer-maintained insurance plan. I must contact my employer to enroll in the employer-maintained insurance for this premium payment election to take effect.</p> <p>By participating in the unused sick leave program and by agreeing to have insurance payments administered by PERSI, I authorize PERSI to release certain information to my former employer and to the insurance company to service my insurance policies during the year and for annual renewals.</p> <p>Idaho Code §67-5333 and §33-1228 require any unexpended sick leave benefits to revert back to the unused sick leave fund at my death and cannot be transferred to a spouse or beneficiary. If I choose Election 2 or Election 3, I understand that such a reversion is more likely to occur.</p>		
<table border="1"> <tr> <td>Signature</td> <td>Date</td> </tr> </table>	Signature	Date
Signature	Date	





## Alternate Evidence for Date of Birth

### Purpose of the Form

To receive a retirement benefit, a member and the member's Contingent Annuitant must furnish satisfactory evidence of their date of birth.

PERSI requests a certified copy of a birth certificate as proof of age. PERSI will accept the following alternate evidence for this requirement.

**Note:** Send photocopies of the documents, not the originals. Copies cannot be returned, PERSI retains all copies for a permanent record.

- Documents must show the date of birth or age as of a specific date. Two or more items from these lists may be necessary.

### Alternate Evidence for Date of Birth

#### Group 1 - One (1) item from this group that shows date of birth (month, day and year)

- Delayed Birth Certificate
- Military Discharge Record (DD214)
- U.S. Passport
- Certificate of Naturalization
- Certificate of Citizenship
- Census Record (from the Department of Vital Statistics, Washington, DC)

#### Group 2 - Two (2) items from this group; one item must show date of birth (month, day and year) and the second item may show age only

- Current Driver's License from state of residence
- Current Concealed Weapons License
- Current Military Identification
- Child's Birth Certificate (if applicant is the parent and the parent's age is shown)
- Marriage Record
- Certified copy of a birth record



## Alternate Evidence for Social Security Card

### Purpose of the Form

In some instances, a member and/or the member's Contingent Annuitant must furnish a copy of the Social Security Card issued by the Social Security Administration. PERSI will accept alternate evidence for these requirements as listed below.

**Note:** Send photocopies of the documents, not the originals. Copies cannot be returned, PERSI retains all copies for a permanent record.

- For Social Security Card Options see "Alternate Evidence for Social Security Number" below. You may request a copy of your Social Security Card directly from the Social Security Administration, either online or through a local office.

### Alternate Evidence for Social Security Number

- Duplicate copy of Social Security Card issued by the Social Security Administration
- Copy of the receipt issued by the Social Security Administration in response to a request for a replacement Social Security card showing the person's **full name and full social security number**.
- Social Security Benefit Award Letter showing the person's **full name and social security number**.
- Medicare Card showing the person's **full name and social security number**.
- Government issued 1099-G showing the person's **full name and social security number**.
- Military Discharge Record (DD214) provided the member's **full name and social security number** appear on the record.