

FERS/CSRS Plan Intake

Participant(P)/Employee/Retiree Name: _____

Alternate Payee(AP)/Former Spouse (FS) Name: _____

Name of Federal/State agency where employed: _____

Check One:

_____ CSRS Civil Service Annuity #: _____

_____ FERS Federal Service Annuity#: _____

Employment Information:

1. Did parties' marriage last at least 9 months? Yes No
2. Did Participant perform at least 18 months of civilian service? Yes No
3. Date of Hire: _____ (Month/Day/Year)
4. Is Participant currently retired? Yes No
5. Date of Retirement: _____ (Month/Day/Year)
 - a. Retirement Claim #: _____
 - b. What benefit option was selected at time of retirement? _____
 - c. What form of benefit did Participant select?
 - Joint and Survivor annuity with Former Spouse
 - Joint and Survivor Annuity with someone else
 - Single Life Annuity

Division of Plan Information:

1. How is Former Spouse's share determined?
 - Fixed Percentage of monthly benefit
 - Fixed Dollar amount of monthly benefit (excludes COLAs)
 - Formula (Time Rule/Coverture Fraction/ % of martial portion)
Number of months married while in service: _____
2. Which level of the Employee Annuity is to be divided (Self-only, gross, or net)?
 - self-only annuity** (highest figure)
 - total monthly pymt to Employee on retirement as a single life annuity on life of Employee with no deductions
 - gross annuity** (lower than self-only, higher than net)
 - monthly pymt to Employee on retirement after a deduction is made to provide a Former Spouse Survivor Annuity (FSSA)
 - If Participant is/did elect a Survivor Annuity on for benefit of Former Spouse then this is the level most parties choose because P and FS each share in the cost to provide this benefit in accordance with their respective percentage of the monthly benefit.

net annuity (lowest figure)

- monthly pymt to Employee on retirement after deductions are made for FSSA premium, health insurance premiums, life insurance, Medicare, federal and state withholding taxes, and payments made under another COAP

3. If Former Spouse dies first, who should receive benefits?

- Revert to Participant
 Estate of Former Spouse
 Minor children of marriage between FS and P

4. Is Former Spouse entitled to the Former Spouse Survivor Annuity (FSSA)?

- Yes
 No

5. Does or will Participant have pension benefits from military service?

- Yes
 No

6. Is Participant waiving military retirement and adding military service time or credits to federal civilian retirement plan?

- Yes
 No

7. If yes to #6, Branch of Service: _____

8. If yes to #6, is or was Participant: Active Duty and/or Reserve

9. If Active Duty, how many points did Participant accumulate during marriage? _____

10. If Reservist, how many points did Participant accumulate during marriage? _____

11. Have any prior QDROs/COAPs/MPDOs been filed on this Retirement Plan?

- Yes: If Yes, please send all copies
 No

Additional Forms to Provide:

- If retired, please provide Your Federal Retirement Benefits Pamphlet/Booklet (Explanation of Benefits) provided to you by OPM upon retirement.
- Retirement benefits statement/pay stub