



# Application for Recalculation of Benefits

Form R – Revised 12/19/2011

Please print or type in black ink. Completed form should be mailed or faxed to PERS and must be on file with PERS at the time of retiree's death to be effective. See bottom of form for contact information.

## 1 Retiree Information – PERS will automatically update the mailing address on file with the mailing address listed below.

First Name: \_\_\_\_\_ MI: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Social Security No.: \_\_\_\_\_ E-Mail: \_\_\_\_\_  
Phone: \_\_\_\_\_  Cellular  Home  Work Phone: \_\_\_\_\_  Cellular  Home  Work

## 2 Retirement Plan – Select applicable plan.

Public Employees' Retirement System of Mississippi (PERS)  Mississippi Highway Safety Patrol Retirement System (MHSPRS)  
 Supplemental Legislative Retirement Plan (SLRP)

## 3 Qualifying Event and Benefit Payment Option Selection – Select one.

- Death:** My previously designated beneficiary under Base Option 2, 4, or 4A, as applicable, has died, and I request that my benefit be recalculated under the **Maximum Retirement Allowance** or **Base Option 9** for MHSPRS.  Attach a copy of the death certificate.
- Divorce:** My previously designated beneficiary under Base Option 2, 4, or 4A, as applicable, and I have divorced, and I request that my benefit be recalculated under the **Maximum Retirement Allowance** or **Base Option 9** for MHSPRS.  Attach a copy of the divorce decree.
- Marriage:** I am now married, and I request that my benefit be recalculated from the Maximum Retirement Allowance or Base Option 1 to the base option selected below to provide beneficiary benefits to my spouse.  Attach a copy of the marriage certificate and select available base option below after obtaining an estimate of benefits from PERS.
  - Option 2**, 100 Percent Joint and Survivor Annuity for One Beneficiary  **Option 4**, 75 Percent Joint and Survivor Annuity for One Beneficiary
  - Option 4A**, 50 Percent Joint and Survivor Annuity for One Beneficiary

## 4 Beneficiary Designation – Attach copy of the birth certificate and a copy of the Social Security card for any beneficiary listed.

**Beneficiary for Base Payment Options 2, 4, and 4A** – Designate your spouse as beneficiary under the applicable option if "Marriage" is your qualifying event.

Spouse's Name \_\_\_\_\_ Social Security No. \_\_\_\_\_ Birth Date mm/dd/ccyy \_\_\_\_\_ Marriage Date mm/dd/ccyy \_\_\_\_\_

**Beneficiary(ies) for unused contributions under the Maximum Retirement Allowance or Base Options 2, 4, 4A, or 9, as applicable** – If more than one primary beneficiary is listed, those primary beneficiaries will share equally unless otherwise noted. Secondary beneficiaries also will share equally unless otherwise noted.  Attach additional sheet if you wish to name more than two beneficiaries.

Beneficiary Name	Social Security No.	Birth Date mm/dd/ccyy	Relationship	Beneficiary Percentage Use whole numbers
_____	_____	_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Secondary _____ %
_____	_____	_____	_____	<input type="checkbox"/> Primary <input type="checkbox"/> Secondary _____ %

## 5 Change of Federal Tax Withholding Status, Exemptions, and Preference – Complete this section to change tax withholding on record.

**Withholding Status** – Select one.  Married  Single Total Number of Exemptions Claimed: \_\_\_\_\_

**Withholding Preference** – Select one.

- I do not wish to have federal withholding tax deducted from my monthly benefit payment.** I understand that I am responsible for payment of federal income tax on the taxable portion of my retirement annuity and that I may be subject to tax penalties under the estimated tax payment rules if my payments of estimated tax and withholding are not adequate.
- I wish to have PERS determine the amount, if any, of federal withholding tax to be withheld from my monthly benefit payment in accordance with the applicable tax tables using the marital status and exemptions indicated above.
- I wish to have PERS determine the amount, if any, of federal withholding tax to be withheld from my monthly benefit payment in accordance with the applicable tax tables using the marital status and exemptions indicated above. I also wish to have \$\_\_\_\_\_ withheld from each monthly benefit payment in addition to the amount to be withheld on the basis of withholding status and exemptions claimed.
- I wish to have PERS withhold a total amount of \$\_\_\_\_\_ from each monthly benefit payment.

## 6 Applicant Authorization – If an authorized representative signs this form, attach a copy of the durable power of attorney, conservatorship or guardianship papers, or other legal documents as proof of authority to sign this form.

I hereby revoke any previous base option selection and beneficiary designation on file in the physical office of PERS. I have reviewed and understand the base options that are available to me. With that understanding, I agree that the base option which I have selected and the beneficiary(ies) that I have designated above shall be effective upon filing of this application in the physical office of PERS in the event of my death after such filing.

Applicant's Signature: \_\_\_\_\_ Date mm/dd/ccyy: \_\_\_\_\_