

WRS Estimate Request Form

This information will be used by the UW-Stout Staff Benefit Office to either calculate preliminary WRS estimates or to request Wisconsin Retirement System (WRS) annuity estimates from the Department of Employee Trust Funds (ETF). Requesting estimates places you under **NO OBLIGATION** to retire. Your request for estimates is completely confidential. Please indicate below which type of estimate you are requesting.

- Calculate preliminary WRS estimates
 Notify me when estimates are complete to set up a meeting
 Mail estimates to my home address
 Mail estimates to my office address
- Request official WRS estimates from the Dept of Employee Trust Funds (Packet will be mailed from ETF directly to your home address)

Personal Information

Name: _____
Social Security Number: _____ Date of Birth: _____
Expected Date of Retirement: _____
Spouse or Named Joint Survivor's Date of Birth: _____
(a named joint survivor cannot be more than 19 years younger than you, if they are not your spouse)
Spouse or Named Joint Survivor's Name: _____

Military Service Information

Any Military Service: _____ If so, how much: _____
(a copy of DD-214 military discharge papers need to be sent with the request, unless previously submitted to ETF)

Salary

Any salary changes anticipated (i.e. overloads, increase responsibility, Winterm): _____
Academic Year employees, do you anticipate working summer session? _____
If yes, dollar amount of summer session contract: _____
Dollar amount of summer session contract worked prior to June 30, of current fiscal year: _____

Social Security Accelerated Payment Information

If under age 62, what is the projected monthly amount you expect from Social Security at age 62: _____

Forfeited Service

Have you ever worked for a WRS employer and withdrew WRS contributions? _____
If so, are you interested in receiving information on purchasing that forfeited service? _____
If yes, what were the years forfeited and where was the service performed? _____

Return to Mary Kay Sankey
203 Administration Building