

Fairfax County Retirement Systems

**\*\*FCPS School employees please  
use SCHOOLS specific Application**

## Benefit Estimate Request

**Employees' System** 
**Police Officers System** 
**Uniformed System** 

**Please Note:** You may request an estimate if you are one year or less from your earliest retirement date.

If you are more than one year from your earliest retirement date you will receive a copy of your Annual Benefit Statement from December 31. By visiting the Retirement Systems website and establishing an account, you can generate your own retirement and DROP benefit estimates. Please visit <http://www.fairfaxcounty.gov/retirement/> and click on "Retirement Account Log In" to establish an account in Web Member Services (WMS). For information on retirement classes, please visit <http://www.fairfaxcounty.gov/retirement/> and click on the link for "Retirement Classes".

**Please be aware that classes fill quickly – please apply approximately 3 months prior to the class date you hope to attend.**

EMPLOYEE DATA			
Social Security # (Last 4 Digits)	Name (Last)	(First)	(Middle)
Agency/Job Title		Daytime Phone	
E-mail address		Date of Birth	
Name of Spouse		Date of Birth of Spouse	
Member's Signature: _____ Date: _____			

Specify retirement date to be used in estimate: \_\_\_\_\_, **OR** check the appropriate box.

First date eligible for normal service retirement **OR**  First date eligible for early service retirement

**\* Please note:** All estimates are based on current information at the time the estimate was generated. You will be provided with an estimate for ONE retirement date. **If you request multiple dates, only the first date will be used to calculate your benefit.** Please see complete policy for estimate requests on the reverse (page 2).

I have some part-time service? Yes  Dates: \_\_\_\_\_

Break(s) in service? Yes  Dates: \_\_\_\_\_

Please provide me with a DROP estimate in addition to a Normal Service Retirement estimate.

**(The option to participate in DROP is only available for Normal Service Retirement-eligible members.)**

Please return this form to:

## Fairfax County Retirement Systems Policy on Benefit Estimate Requests

The Retirement Systems policy is to provide an estimate of retirement benefits to individuals having less than one year before they are eligible for early retirement. Employees who are **within one year of their early retirement eligibility date** may request an estimate of their retirement benefits using an "Estimate Request" form (found on the reverse of this document). For information on the optional Joint & Last Survivor (J&LS) benefit for your current legal spouse, you must provide the name and date of birth of your spouse on the Benefit Estimate Request form.

Retirement benefit figures will be calculated using any sick leave balance or leave without pay balances within that employee's record. **Individuals are limited to one request for an estimate in the calendar year.** You may choose ONE date for us to calculate your benefit OR you may check the box for earliest eligibility for regular retirement. If you write down multiple dates, only the first date listed will be used to do your calculations.

If you are **not** within one year of retirement eligibility, you can log in to your retirement account and use Web Member Services (WMS) on the Retirement Systems website to calculate estimates of your retirement benefit.

**Active Employees can access the WMS internet-based program by visiting the website at <http://www.fairfaxcounty.gov/retirement/>-- Under "Related Links" in the left navigation bar, click on "Retirement Account Log In" to establish an account and calculate your retirement estimate.**

The Retirement Systems website allows members to work with their own projections, based on individual assumptions of salary increases and variable retirement dates. Members can adjust their projected retirement date to account for sick leave balances and leave without pay balances. DROP is included as an option when using the internet estimate calculator. Please check with your payroll contact to verify your sick leave and leave without pay balances if you have questions regarding either one.

**FYI:** Remember that every 172 hours of sick leave equates to one month of service. You can visit the Retirement Systems website at <http://www.fairfaxcounty.gov/retirement/> for more information on how sick leave can affect your retirement eligibility. A series of **Fact and Tip Sheets** that address frequently asked questions of members regarding sick leave credit and other subjects is available.

Full-time members of the County Retirement Systems receive an "Annual Benefit Statement" once per year (in mid to late February). Statements are mailed to members who were active in one of the three Retirement Systems as of December 31 of the previous year. The Annual Benefit Statements do not account for sick leave, but use of the estimator program in WMS does. To request a detailed estimate from the Retirement Systems, that will take Sick Leave into account and can also give information on Joint and Last Survivor options, a written request is required. These requests are limited to once per calendar year and are only provided to those members who are determined to meet the "within one year" criteria.

All requests for estimates must be in writing on an "Estimate Request" form. Completed request forms can be faxed or mailed to the address listed on page 1 (*the other side of this form*). Once your estimate request is received and your retirement eligibility date is verified, your estimate will be calculated and mailed to your home address as soon as your payroll information has been verified and a calculation completed.

If you have difficulty understanding your annual benefit statement or your retirement benefit estimate, please refer to your Fairfax County Employees' Retirement System Handbook. A copy of the Retirement System Handbook can be downloaded from the Retirement Systems website or you can request one by calling our offices at 703-279-8200. The Retirement System Handbook is your best resource for examples and information regarding your retirement benefit.