

Shelby County Retirement System

PENSION ESTIMATE REQUEST

PLEASE READ THE FOLLOWING CAREFULLY

YOU MUST MEET THE FOLLOWING REQUIREMENTS TO REQUEST AN ESTIMATE

1. You must be vested in the pension plan with 7 ½ years
2. You must be eligible to retire within one (1) year of the date of the estimate request

INSTRUCTIONS:

Estimate requests will NOT be processed for employees NOT VESTED (7 ½ years of service) in the pension plan and NOT eligible to retire within one (1) year of the date of the request. **DO NOT REQUEST AN ESTIMATE ANY FURTHER THAN ONE (1) YEAR OUT.**

Complete the Estimate request form and email to retirement.office@shelbycountyttn.gov or you may fax the request to the Retirement Office (901)-222-1960. **NO MORE THAN ONE (1) ESTIMATE WITHIN A 6 MONTH PERIOD WILL BE PROCESSED.**

Processing your estimate request takes time!!! In order to process your estimate request, all salary history and pension service time must be verified. Pension service time will be adjusted for all unpaid leave of absences that results in you not working at least 51% of a month. Due to the complexity of verifying all records it will take time to complete your Estimate Request. High volume of requests during peak times will delay the processing of your request. Estimate Requests are processed on a priority basis.

PLEASE PRINT CLEARLY

DATE OF REQUEST _____

NAME: _____ (INCLUDE PRIOR NAMES DURING EMPLOYMENT)

LAST FOUR DIGITS OF YOUR SSN: XXX-XX-_____

ESTIMATED DATE OF RETIREMENT: _____

OPTIONAL CASH DISTRIBUTION AMOUNT: _____ **(PLAN C ONLY)**

ARE YOU A CITY TO COUNTY TRANSFER? CIRCLE YES OR NO

PHONE NUMBER: _____

HOW DO YOU WANT TO RECEIVE THE ESTIMATE? PLEASE CHECK ONE OF THE FOLLOWING.

MAILED TO HOME ADDRESS _____

SEND VIA E-MAIL _____ E-MAIL ADDRESS: _____