



# BENEFITS WORKSHEET

Employee Name \_\_\_\_\_

## RETIREMENT SYSTEM (CSRS/FERS)

**PLAN TYPE:** CSRS  CSRS Offset  FERS  FERS Transferee

Subject to Special Provisions\*  Estimated 'High-3' Salary \$ \_\_\_\_\_  
 (Law Enforcement Officer, Firefighter, etc.) Minimum Retirement Age (FERS) \_\_\_\_\_

**RETIREMENT DATES:**  
 Offset/Transferee Date \_\_\_\_\_ Retirement Service Computation Date \_\_\_\_\_  
 Desired Retirement Date \_\_\_\_\_ Mandatory Retirement Date\* \_\_\_\_\_

**CREDITABLE SERVICE TIME:**

	Years	Months	Days
Civilian Service	_____	_____	_____
Military Service	_____	_____	_____
Unused Sick Leave	_____	_____	_____
<b>Total Creditable Service</b> (Total less than 30 are not used)	_____	_____	_____

**RETIREMENT ANNUITY ESTIMATE:**

	Annually	Monthly	Annually	Monthly
Unreduced Benefit \$	_____	\$ _____	Reduced Benefit \$	\$ _____

**SURVIVOR BENEFIT ESTIMATE:**

<b>CSRS</b>	Annually	Monthly	<b>FERS</b>	Annually	Monthly
Full 55% Benefit \$	_____	\$ _____	Full 50% Benefit \$	_____	\$ _____
or Partial _____% Benefit \$	_____	\$ _____	or Partial 25% Benefit \$	_____	\$ _____

## THRIFT SAVINGS PLAN (TSP)

<b>Current Contribution Amount</b>	<b>CSRS</b>	<b>FERS</b>	<b>Current Account Allocation</b>
Agency Auto Contribution (FERS only - Vested after 3 years)	n/a	1%	<b>G Fund</b> _____ % (Government)
Employee Contribution Pre-Tax / Roth	_____ %	_____ %	<b>F Fund</b> _____ % (Fixed Income)
Matching Contribution (FERS only)	n/a	_____ %	<b>C Fund</b> _____ % (Common Stock)
<b>Total Contribution Amount</b> Pre-Tax / Roth	_____ %	_____ %	<b>S Fund</b> _____ % (Small Cap)
Annual Catch-Up Contribution (age 50 or older)	\$ _____		<b>I Fund</b> _____ % (International)
Current Account Balance	\$ _____		<b>L Funds</b> (Lifecycle) YES <input type="checkbox"/> NO <input type="checkbox"/>
Loan Amounts Outstanding	\$ _____		2050 2040 2030 2020 Income (Give the full name)
Eligible for In-Service Withdrawal (age 59 1/2 or older)	YES <input type="checkbox"/> NO <input type="checkbox"/>		

## VOLUNTARY CONTRIBUTION PLAN (VCP)

(This plan is available for CSRS and CSRS Offset employees only.)

Eligible Contribution Amount \$ \_\_\_\_\_ Current Account Balance \$ \_\_\_\_\_  
 (10% of current lifetime earnings)  
 Current Contribution Amount \$ \_\_\_\_\_  
 (must use multiples of \$25)