MARYLAND STATE RETIREMENT AGENCY 120 EAST BALTIMORE STREET BALTIMORE, MARYLAND 21202-6700

APPLICATION FOR AN ESTIMATE OF SERVICE RETIREMENT ALLOWANCE

IMPORTANT: Print in ink or type. If you need assistance in completing this application, call a retirement benefits specialist at 410-625-5555. If long-distance, call 1-800-492-5909.

FOR RETIREMENT USE ONLY

FORM 9 (REV. 3/15)

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BASIC OPTION 1	at your death. After your death, your beneficiary or estate will receive one payment if your death occurs on the 16th of the month or later. 2N 1 Provides a lower monthly benefit than the Basic Allowance, but guarantees monthly payments that equal the total of your retirement benefit's Present Value. The Present Value of your benefit is figured at the time of your retirement. If you die before receiving monthly payments that add up to the Present Value, the remaining payments will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.																													
OPTION 2	con you	Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit will continue to be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.								is of																				
OPTION 3	paid you	Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death one half of the monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.							ns of																					
OPTION 4	Provides a lower monthly benefit than the Basic Allowance, but guarantees the return of your accumulated contributions and interest as established when you retire. If you die before you have recovered the full amount of your accumulated contributions and interest, the remainder will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.																													
OPTION 5	to y the the ben	Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. It also provides that your monthly benefit will "pop-up" to the Basic Allowance for your lifetime if your beneficiary dies before you. If your original beneficiary dies and you are collecting the Basic Allowance and decide to name a new beneficiary, your benefit will be recalculated under Option 5 based on the new beneficiary designation. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.							o" to cting new																					
OPTION 6	ben "po are bas with	efit p p-up colle ed c you	s a lo paid to to the ecting on the ur fina	you ne Ba the new I reti	will basic A Basic bene reme	oe pa Illow c All eficia nt a	aid to vanc owa ary o pplio	o you e for nce a design cation	ir sur your and o natio	rvivin lifeti decid on. If	g be me it le to you o	nefi f yo nar cho	iciar our b me a oose	y fo ene a ne this	or his deficiar ew be s option	or hery di enef	er li ies l icia you	feti befo ry, ı mı	me. ore you ust s	It als you. r ber	so pi If yo nefit	ovic our c will	les rigi be	that nal reca	you ben alcu	ur m efic late	onth iary d ur	nly be dies nder	enefi and Optic	t will you on 6
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Date

Member's Signature

Important Points To Know...

when filing the

Application for an Estimate of Service Retirement Allowance (Form 9)

Please review the following information in regards to requesting a retirement

allowance estimate. For retirement counseling call: 410-625-5555 or 1-800-492-5909. Completion of a request for an estimate (Form 9) does not obligate you to retire on the date entered on the form. ☐ The estimate of the options selected on the form does not include any unused sick leave days you may have at the time of retirement. At retirement, your employer will certify any unused sick leave days to the Retirement Agency but you must retire within 30 days of separating from employment in order to be credited with these days. These days are then converted into months and increase the monthly benefit you will actually receive. The estimates do not include deductions for taxes, health insurance, etc. They are estimated gross monthly amounts. You must claim any military service you have prior to your retirement. Military service claimed prior to submission of the estimate form (Form 9) will reflect that military credit in the monthly benefits shown on the estimate. Active Members Only: Submit the Request to Purchase Previous Service (Form 26) if you want to purchase any eligible service that is not in your account. A purchase request must be submitted to SRA prior to retiring. You may request the cost to purchase eligible service when you are within 12 months of retiring. If you are submitting a purchase request, you should submit the estimate form (Form 9) and check the bottom of the form in order to receive an estimate based on your service with and without the purchase. Estimates will only be done if the retirement date that you entered on the form is within one year of the date when the form was completed. You must also be eligible to retire on the date that you selected. Retirement dates are always the first of the month. Once your first retirement check is paid (payments are made the end of the month), you may not change your payment option so selection of this option is very important. Your option selection may affect your benficiary's eligibility for continued health insurance.

> Maryland State Retirement and Pension System 120 East Baltimore Street · Baltimore, MD 21202-6700 sra.maryland.gov

Continued on following page.

Important Points to Know when filing the *Application for an Estimate of Service Retirement Allowance* (Form 9)

Со	ntinued from previous page.
	Provide a beneficiary's name, relationship to you, date of birth, and gender if you are interested in a dual-life annuity and ongoing beneficiary health benefit coverage. If you choose Option 2 or Option 5, the beneficiary may not be more than ten years younger than you unless the beneficiary is your spouse or your disabled child. You may still provide a monthly benefit to a beneficiary more than ten years younger who is not your spouse or disabled child under Option 3 or Option 6.
	Review your Benefits Handbook which may be found on the Retirement Agency website at www.sra.state.md.us for an explanation regarding each payment option.
	You may also speak with a retirement benefits specialist to discuss the options either by making an appointment or by calling a retirement benefits specialist at 410-625-5555 or toll-free 1-800-492-5909.
	Due to the volume of requests, the Retirement Agency does not acknowledge receipt of estimate requests. Please allow at least eight weeks for processing.
	Return this form to the address below or fax to 410-468-1707.
	When you are ready to start receiving your retirement benefit, please contact your retirement coordinator, a retirement benefits specialist or visit the Retirement Agency website to receive the necessary forms.