



# Birmingham Retirement Systems

City of Birmingham Retirement & Relief System  
City of Birmingham Firemen's & Policemen's Supplemental System

*Strong, Solid, Stable . . . for your secure future*

## REQUEST FOR PENSION BENEFIT ESTIMATE

Any employee who is within three (3) years of retirement may request a Pension Benefit Estimate. A Request for a Pension Benefit Estimate is not an application for benefits, but is for the purpose of providing information only. A pension benefit estimate is a useful tool when deciding when to retire. It should not be relied upon as a basis for any significant or life-altering financial or employment decisions. Your pension benefit amount will be calculated, verified and audited by the Office of Payroll & Pension Administration when you actually apply for retirement. You must be vested in order for the Office of Payroll & Pension Administration to generate a pension estimate. This form must be completed in its entirety in order to be processed. Incomplete forms will NOT be processed. Please allow 8-12 weeks to receive your estimate via US Mail. Please mail or return this completed form to:

Office of Payroll & Pension Administration – Pension Estimates  
710 20<sup>th</sup> Street North, Room 189 City Hall  
Birmingham AL 35203

Employee's Name \_\_\_\_\_ Date \_\_\_\_\_

Department \_\_\_\_\_ Employee ID# \_\_\_\_\_

Soc Sec # \_\_\_\_\_ Date of Birth \_\_\_\_\_ Current Age \_\_\_\_\_

Marital Status \_\_\_\_\_ Cell Phone # \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Spouse's DOB \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State ZIP \_\_\_\_\_

**ESTIMATED DATE OF RETIREMENT** \_\_\_\_\_

Have you purchased any prior creditable service? Yes \_\_\_ No \_\_\_

Have you received disability benefits at any time? Yes \_\_\_ No \_\_\_

Have you had any breaks in service or periods of unpaid leave? Yes \_\_\_ No \_\_\_

Have you at any time received Workers' Compensation benefits? Yes \_\_\_ No \_\_\_

**IMPORTANT NOTE: If you are planning to retire within the next two months, you should immediately contact the Payroll Coordinator for your department to begin the Pension Application process. Failure to do so may result in a delay in obtaining Pension Board approval for your benefit, as well as a delay in receipt of your first pension benefit payment.**

I hereby request an estimate of my creditable pension time, estimated monthly pension amount and/or DROP plan amount. Because benefit calculations are date-driven, I understand and acknowledge that I must provide an *estimated* date of retirement in order for an estimate to be generated. The estimated date of retirement does not require or obligate me to actually retire on that date. Additionally, I understand and acknowledge that the calculation I receive will not be an audited calculation and could contain errors; therefore, it should not be relied upon to make employment or other significant life-altering decisions. If I choose to leave City employment based on the results of a pension estimate, I do so at my own risk. Official, verified and audited calculations will be provided to me at the time of retirement only. Additionally, I understand and acknowledge that it is my responsibility to immediately bring any errors or omissions to the attention of the Office of Payroll & Pension Administration. I understand and acknowledge that pension estimates cannot be projected more than three (3) years into the future, and that benefits amounts are affected by changes in my length of creditable service, changes in my pay or salary, and by changes in the pension law.

\_\_\_\_\_  
Signature of Employee