

## REQUEST FOR INFORMATION

**In response to your request for a computation of your pension benefit the following information is required:**

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's Social Security Number: \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

Home Telephone Number: \_\_\_\_\_

- COPIES OF BIRTH CERTIFICATES OR BAPTISMAL CERTIFICATES FOR YOURSELF & SPOUSE
- COPY OF MARRIAGE CERTIFICATE
- COPY OF DEATH CERTIFICATE OF SPOUSE, IF APPLICABLE
- IF THE EVENT OF A PRIOR MARRIAGE, PLEASE PROVIDE THE FOLLOWING:
  - COPY OF PETITION FOR DIVORCE
  - COPY OF FINAL DIVORCE DECREE
  - COPY OF PROPERTY SETTLEMENT

**The following forms are to be completed and returned to our office along with the above information:**

- APPLICATION FOR TYPE OF BENEFIT REQUESTED (i.e., retirement, survivor, or disability)
- SUPPLEMENTAL QUARTERLY REPORT
- NOTICE OF TERMINATION / CHANGE OF STATUS

When we receive this information we will compute your retirement benefit under each option. We normally compute the Maximum Option and Option One for unmarried pension applicants. In addition to the Maximum and Option One, we compute Options Two, Two-A, Three, Three-A and Five for married applicants.

There is another option available for all applicants that would provide a monthly benefit to an eligible beneficiary. If you would like more information on this option, please contact the Pension Fund Office.

We will send you a letter outlining your monthly benefit under each option and a copy of the option forms. At that time you will select one option and your beneficiary. Once you have made the option and beneficiary choice, the law does not allow you to change either the option or your beneficiary.

Please feel free to call on us if you have any questions concerning your future retirement.

## APPLICATION FOR BACK-DEFERRED RETIREMENT OPTION PLAN (Back-DROP)

APPLICANT'S NAME \_\_\_\_\_ BACK-DROP PARTICIPATION BEGINS \_\_\_\_/\_\_\_\_/\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_ BACK-DROP PARTICIPATION ENDS \_\_\_\_/\_\_\_\_/\_\_\_\_

PARISH \_\_\_\_\_ BACK-DROP PARTICIPATION PERIOD: \_\_\_\_ YEARS \_\_\_\_ MONTHS

EMPLOYMENT DATE \_\_\_\_\_ BREAK IN CONTINUOUS SERVICE (If applicable)  
From \_\_\_\_/\_\_\_\_/\_\_\_\_ thru \_\_\_\_/\_\_\_\_/\_\_\_\_

Applicant is applying for regular retirement benefits effective \_\_\_\_\_.

Applicant's salary as sheriff, deputy sheriff or member for the thirty-six (36) highest successive months of employment **before the beginning of the Back-DROP period** specified was: (If an interruption of service occurred, the highest thirty-six (36) successive, joined months of employment are applicable.) Salary for the highest sixty (60) successive or joined months of employment will be needed for those members whose first employment making them eligible for membership in the retirement system began on or after July 1, 2006.

Jan	_____ \$ _____	Jan	_____ \$ _____	Jan	_____ \$ _____	Jan	_____ \$ _____
Feb	_____ \$ _____	Feb	_____ \$ _____	Feb	_____ \$ _____	Feb	_____ \$ _____
Mar	_____ \$ _____	Mar	_____ \$ _____	Mar	_____ \$ _____	Mar	_____ \$ _____
Apr	_____ \$ _____	Apr	_____ \$ _____	Apr	_____ \$ _____	Apr	_____ \$ _____
May	_____ \$ _____	May	_____ \$ _____	May	_____ \$ _____	May	_____ \$ _____
Jun	_____ \$ _____	Jun	_____ \$ _____	Jun	_____ \$ _____	Jun	_____ \$ _____
Jul	_____ \$ _____	Jul	_____ \$ _____	Jul	_____ \$ _____	Jul	_____ \$ _____
Aug	_____ \$ _____	Aug	_____ \$ _____	Aug	_____ \$ _____	Aug	_____ \$ _____
Sep	_____ \$ _____	Sep	_____ \$ _____	Sep	_____ \$ _____	Sep	_____ \$ _____
Oct	_____ \$ _____	Oct	_____ \$ _____	Oct	_____ \$ _____	Oct	_____ \$ _____
Nov	_____ \$ _____	Nov	_____ \$ _____	Nov	_____ \$ _____	Nov	_____ \$ _____
Dec	_____ \$ _____	Dec	_____ \$ _____	Dec	_____ \$ _____	Dec	_____ \$ _____

REQUESTED BY \_\_\_\_\_  
Applicant's Signature

DATE \_\_\_\_/\_\_\_\_/\_\_\_\_

CERTIFIED CORRECT \_\_\_\_\_  
Signature of Sheriff or Authorized Representative

DATE \_\_\_\_/\_\_\_\_/\_\_\_\_

# NOTICE OF TERMINATION/CHANGE OF STATUS

EMPLOYEE NAME \_\_\_\_\_  
HOME ADDRESS (STREET/P.O. BOX) \_\_\_\_\_  
CITY, STATE & ZIP CODE \_\_\_\_\_  
HOME TELEPHONE NUMBER \_\_\_\_\_  
SOCIAL SECURITY NUMBER \_\_\_\_\_  
PARISH OF EMPLOYMENT \_\_\_\_\_  
DATE CONTINUOUS SERVICE BEGAN \_\_\_\_\_  
LAST DATE OF EMPLOYMENT \_\_\_\_\_

**INDICATE YOUR PREFERENCE CONCERNING YOUR FUNDS ON DEPOSIT IN THE SHERIFFS' PENSION FUND.**

\_\_\_\_\_ **I wish to leave my funds on deposit:**

\_\_\_\_\_ Due to change in status to Part-time.

\_\_\_\_\_ Due to call to Active Military Duty.

\_\_\_\_\_ For possible later employment. If termination is due to Leave of Absence, expected date of return \_\_\_\_\_.

\_\_\_\_\_ For Retirement when I become eligible. Expected date of retirement \_\_\_\_\_

\_\_\_\_\_ **I wish to leave my funds on deposit due to transfer of employment from present Parish of \_\_\_\_\_ to \_\_\_\_\_ Parish, effective date of \_\_\_\_\_.**

\_\_\_\_\_ **I have terminated employment and have no plans to work for another sheriff's office in Louisiana. I wish to apply for a refund of my employee contributions. I understand that a refund automatically cancels all my rights in the fund and forfeits all prior service and military service as well as membership credit for the period refunded. (This form must be completed, signed by the member and submitted with the refund form to be eligible to receive a refund.)**

\_\_\_\_\_ **I wish to apply for a Direct Rollover of my funds.**

\_\_\_\_\_ **I wish to make application for Regular Retirement.**

\_\_\_\_\_ **I wish to make application for Deferred Retirement Option Plan (BACK DROP) Benefits.**

\_\_\_\_\_ **I wish to make application for Disability Retirement Benefits.**

\_\_\_\_\_  
EMPLOYEE'S SIGNATURE

\_\_\_\_\_  
SHERIFF OR AUTHORIZED REPRESENTATIVE

\_\_\_\_\_  
DATE





# INSURANCE INVOICE

**WITHHOLDING FROM SHERIFFS' PENSION FUND BENEFIT CHECKS  
(PLEASE REMIT BY THE 20<sup>TH</sup> OF THE PREVIOUS MONTH)**

\_\_\_\_\_  
(MONTH, YEAR)

PENSION RECIPIENT	SOCIAL SECURITY NO. (OR MEMBER NO.)	TOTAL PREMIUM	SHERIFF PAYS	TO BE WITHHELD
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\*\*INVOICE PREPARED BY \_\_\_\_\_ **PARISH** \_\_\_\_\_

*\*\*BY SIGNING THIS INVOICE, YOU AUTHORIZE SPF TO WITHHOLD THE SPECIFIED FUNDS FROM THE RECIPIENTS' BENEFIT\**