

Obtaining Federal Plan Information for Present Value Calculations

We are finding it exceedingly difficult to obtain information for Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) participants, especially for postal workers. Often times we do not receive any response to our discovery requests. For this reason, we ask that the participant assist us in obtaining the required information.

We understand that Federal employees have the ability to obtain information online that will allow us to prepare an estimate of benefits for the evaluation. Information can also be obtained from Human Resources. In order to proceed we ask that the plan participant provide the following information:

1. Date of employment and/or Service Computation Date (SCD) for retirement purposes
2. Current accrued benefit estimate (if possible) with an immediate termination date and retirement commencement at the earliest unreduced retirement age
3. Highest 3 years of base pay listed on Form 50 or other equivalent source
4. Any other information that may be relevant to retirement benefits such as law enforcement service, part-time service, military time, unused sick time that will convert for retirement or redeposit service purchase.