

Survivor's Military Service Election

Deceased Employee Covered by the Federal Employees Retirement System (FERS)

Part A. To be completed by employing agency before survivor completes elections in Parts B and C.

1. Deceased employee's name (<i>last, first, middle initial</i>)		2. Date of birth (<i>mm/dd/yyyy</i>)	3. Social Security Number
4. Was a deposit account opened for the employee?		<input type="checkbox"/> Yes, give information requested below <input type="checkbox"/> No	
Period of military service		Amount due (with interest)	Balance due
From (<i>mm/dd/yyyy</i>)	To (<i>mm/dd/yyyy</i>)	\$	\$
5. Agency records indicate that the above named employee had post-1956 military service for which deposit has not been completed. Records also show that the employee--			
<input type="checkbox"/> Qualified for a Civil Service Retirement System (CSRS) component in a FERS benefit and performed military service before being covered by FERS and was--			
<input type="checkbox"/> First employed under CSRS before October 1, 1982; or			
<input type="checkbox"/> First employed under CSRS on or after October 1, 1982.			
<input type="checkbox"/> Qualified for a CSRS component in a FERS benefit and performed military service after being covered by FERS.			
<input type="checkbox"/> Did not qualify for a CSRS component in a FERS benefit.			
6. Name of agency representative to contact for information (<i>last, first, middle initial</i>)		Telephone number & area code ()	
7. Agency personnel office address to which form should be returned		Date election should be received by (<i>mm/dd/yyyy</i>) (30 days from date form is given to applicant)	

Part B. Deposit Election (To be completed by survivor.)

Our records indicate that you might be eligible for a survivor annuity. You have the right to make a deposit for the deceased employee's post-1956 military service. Your decision may affect your rights under FERS. Read "Information About Credit for Post-1956 Military Service for the Survivor of a Deceased FERS Employee" on page 7, carefully to be sure you understand the consequences of including the military service or of not making the deposit. Then make your election, sign and date the form, and return two copies to the employing office shown in item 7 above.

If you decide to pay the deposit, the employing agency of the deceased employee will provide you with the necessary information. Payment must be made in a lump sum to the employing agency of the deceased employee before the Office of Personnel Management (OPM) completes the processing of your application.

I have read this information concerning my right to make a lump sum deposit to the employing agency of the deceased employee for post-1956 military service. (**Note:** An election to make a deposit may be changed at any time before the deposit is actually paid to the agency.)


- ☐ I elect to make (or complete) the deposit to the employing agency of the deceased employee for the post-1956 military service. I understand that this deposit must be paid to the agency in a lump sum within 30 days after the agency notifies me of the amount due.
- ☐ I elect not to make (or complete) the deposit for post-1956 military service. I understand this decision may not be changed at a later date.

Part C. Election to Exclude Military Service from the Annuity (To be completed by survivor of deceased employee who was in receipt of military retired pay at time of death.)

If the deceased employee received military retired or retainer pay that was **not** (1) awarded because of a service-connected disability incurred either in combat with an enemy of the United States or caused by an instrumentality of war and incurred in the line of duty during a period of war, or (2) awarded under reserve retiree provisions (chapter 1223, title 10, U.S. Code, formerly chapter 67, title 10, U.S. Code), you will receive credit toward your Federal Employees Retirement System (FERS) survivor benefit for the military service subject to the rules for post-1956 military deposits. However, if you do receive credit for military service (including any pre-1957 military service), your FERS survivor benefit must be reduced by the amount of any military survivor benefits payable to you. In some instances, it may not be advantageous to receive a survivor benefit including the military service in the computation.

In order to compute your survivor annuity benefits, we need to know if you are eligible for military survivor benefits. If you are eligible to receive military survivor benefits, we need to know if you want to exclude the deceased person's military service from the computation of your FERS survivor benefit.

Are you entitled to receive military survivor benefits?

☐ No ☐ Yes  Specify monthly amount (*if known*),
and attach documentation, if available. \$

Credit for military service will be included in the computation of your FERS survivor annuity benefit unless you elect below to exclude it.

☐ Do not use my deceased spouse's (*former spouse's*) military service in determining my FERS survivor annuity.

Part D. Signature

Signature	Date (<i>mm/dd/yyyy</i>)
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