

# BUREAU OF INDIAN EDUCATION

## Request for a Retirement Estimate

### (For Current Employees Only)

**This is a questionnaire to begin the retirement estimate process.**

**It is NOT an application for retirement!**

**Have you already had a retirement estimate completed within the last 3 years? STOP!**

- Schedule a consultation to review your last retirement estimate.
- Retirement Estimates are ballpark figures and do **NOT** significantly change from year to year.
- You are eligible for one retirement estimate request every 3 years from the date of completion of your last request.
- To schedule a retirement consultation, review the Steps-2-Retire Flyer on the BIE website.
- To request a Retirement Application, send an email request to **BIE-Benefits@bia.gov**.

#### **Benefits Specialist Contact Information:**

- **BIE Headquarters, HINU, and Schools located in CA, OK, SD, ND, OR, and MT. Plus locations under AZ Navajo South and AZ Navajo Central with Polacca and Havasupai**

Stephanie Blanken

**Email:** [stephanie.blanken@bie.edu](mailto:stephanie.blanken@bie.edu)

**Phone:** 785-830-2731

- **BIE Headquarters, SIPI, and schools located in NM and UT. Plus locations under AZ Navajo North**

Vacant

**Email:**

**Phone:**

**To submit your retirement estimate request form, complete the next page. Once completed:**

- You can either email the retirement estimate request form directly to your Benefits Specialist.
- Email the retirement estimate request form to the benefits inbox at [BIE-Benefits@bia.gov](mailto:BIE-Benefits@bia.gov).
- Fax the retirement estimate request form to 505-563-5305.

**Each estimate requires time to research and calculate, we appreciate your patience.**

#### **PRIVACY ACT STATEMENT**

**Authority:** 5 USC 301 and 5 USC

**Purpose:** The principal purpose for collecting the information is to identify employee, to research service records, and to determine eligibility for retirement.

**Routine Use:** The information will be used to identify employee for data research in Personnel, Payroll, and Retirement records.

**Disclosure:** Voluntary; however, failure to provide the requested information may result in inability to provide completed estimate and/or retirement application packet.

## Retirement Estimate Request Form

<b>Name (please print)</b>											
<b>Date of Birth:</b>					<b>Last 4 of Social Security</b>			<b>XXX-XX-</b>			
<b>Contact Phone #</b>					<b>Mailing Address</b>						
<b>Email Address:</b>											
<b>How would you like to receive your completed Retirement Estimate?</b>											
<b>Email it to me:</b>				<b>Mail it to me:</b>				<b>Email &amp; Mail:</b>			
<b>When I want to retire? (Please provide NO MORE than 2 dates)</b>											
<b>Type of Retirement (check one)</b>				<b>Voluntary</b>				<b>Disability</b>			
<b>I am married (check one)</b>			<b>Yes</b>		<b>No</b>						
<b>I have former spouse(s) who may be entitled to annuity</b>					<b>Yes</b>		<b>No</b>				
<b>I worked other federal jobs/other periods (include military service by attaching DD214)</b>											
<b>Agency</b>			<b>In which state?</b>				<b>What years?</b>				
<b>I left the government and pulled out my retirement contributions</b>							<b>Yes</b>		<b>No</b>		
<b>What year?</b>							<b>I paid it back</b>		<b>Yes</b>		<b>No</b>
<b>I retired once before</b>			<b>Yes</b>		<b>No</b>				<b>What year?</b>		
<b>I work at a BIA school that went grant and kept federal benefits.</b>							<b>Yes</b>		<b>No</b>		
<b>I have included copies of my contracts for all years under grant school.</b>							<b>Yes</b>		<b>No</b>		

**NOTE:** The estimates provided are not intended to represent actual amounts. The Office of Personnel Management (OPM) has sole authority and responsibility for adjudicating retirement claims.