

BUREAU OF INDIAN EDUCATION

Request for a Retirement Estimate

(For Current Employees Only)

This is a questionnaire to begin the retirement estimate process if you are within 5 years of retirement eligibility. 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, MT, and WY. Plus locations under AZ Navajo South and AZ Navajo Central with Havasupai**

Stephanie Blanken

Email: stephanie.blanken@bie.edu

Phone: 785-830-2731

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

Michelle Martinez

Email: michelle.martinez@bie.edu

Phone: 505-563-5312

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.
- 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

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

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.