



20XX

Member Annual Statement

PREPARED FOR

PERS ID: A00000

DATE OF BIRTH:  July 10, 1972

OPSRP_1
IMA MEMBER
11410 SW 68TH PKWY
TIGARD OR 97223

SAMPLE

EMPLOYMENT INFORMATION

FIRST HIRE DATE
June 1, 2014

MEMBERSHIP DATE
December 1, 2014

JOB CLASSIFICATION
School Employee

20XX OPSRP PENSION INFORMATION

Your Oregon Public Service Retirement Plan (OPSRP) pension is the first part of your retirement benefit. The pension provides a lifetime monthly benefit at retirement for eligible, vested members. You can produce a pension benefit estimate for a future retirement date on Online Member Services (OMS), located on the PERS website.

What could my pension benefit be at retirement?

$$1.5\% \times \text{years of total retirement credit} \times \text{monthly final average salary} = \text{monthly pension benefit}$$

Vested status:	Yes
20XX retirement credit:	1 year
Total retirement credit:	7 years, 6 months



20XX INDIVIDUAL ACCOUNT PROGRAM (IAP) INFORMATION

The IAP is the second part of your retirement benefit. Your IAP is credited with earnings or losses annually based on the investment returns of your IAP Target-Date Fund. The benefit you will receive from your IAP at retirement is based on your account balance and the distribution option you select. To review IAP information, visit IAP.Voya.com.

IAP Target-Date Fund:	2035
Account balance December 31, 20XX:	\$20,000.00
Employee contributions in 20XX:	\$2,000.00
20XX earnings rate:	5%
Earnings for 20XX:	\$1,100.00
Account balance December 31, 20XX:	\$23,100.00
Next Year's IAP Target-Date Fund:	2035



2021 EMPLOYEE PENSION STABILITY ACCOUNT (EPSA) INFORMATION

Starting July 1, 2020, you contribute a portion of your salary to help pay for your pension benefit. Your new EPSA account is a requirement of Senate Bill 1049, passed by the Oregon Legislature in 2019. This money comes out of your IAP contributions.

Account balance December 31, 20XX:	\$1,000.00
Employee contributions in 20XX:	\$500.00
20XX earnings rate:	10%
Earnings for 20XX:	\$150.00
Account balance December 31, 20XX:	\$1,650.00

IMPORTANT: This annual statement is based on information available to PERS, as reported by your employer(s), as of December 31, 20XX. Please see the reverse side for instructions about correcting personal information.

This statement does not entitle you to any benefits. Your benefits are determined in accordance with Oregon Revised Statutes Chapter 238A. PERS is required to correct any errors in account or membership information and to make any adjustments that are required by law.