

Instructions for Purchase Estimate Request for PERS Service Credit

This form does not entitle you to a benefit estimate.

General information

- Type or print clearly in dark ink. An illegible form could be returned, which could delay your request.
- Do not change anything on the form; alterations will void the form.
- Sign and date the form and mail to PERS at PO Box 23700, Tigard OR 97281-3700.

Section A: Applicant information (Type or print clearly in dark ink. Illegible forms could be returned to you, which could delay your request.)

Fill in the Applicant information section completely.

Enter your PERS ID number. If you do not know your PERS ID number, leave the space provided blank. Your PERS ID number can be found on your annual statement(s).

Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes if you are unable to provide a PERS ID number. If you do not provide either your PERS number or SSN, it could take PERS staff longer to process your form.

Enter your date of birth.

Enter your day and evening phone numbers. Please include the area code. Include an extension number if you have one.

Section B: Effective purchase date

Enter the month and year you want the purchase to be effective.

Section C: Police officer and firefighter service credit

Check The box in this section if you meet the following criteria:

- Must be employed in a PERS Chapter 238 police and fire position at time of purchase.
- The member must complete and return the [Certification of Non-Participating Oregon PERS Employer for Police or Firefighter](#) form before an estimate can be completed.
- Must have been employed as a police officer or firefighter and service must have been with an Oregon public employer that was not participating in PERS.
- A Tier One/Tier Two active member can purchase up to 10 years of service if PERS membership was established before January 1, 2000; can purchase five years of service if PERS membership was established on or after January 1, 2000.
- May purchase up to the 10-year limit (or part) but there is only one opportunity to make this purchase.
- No minimum service required unless PERS membership was established on or after January 1, 2000; then 60 calendar months of membership is required.
- Eligible purchases can be made anytime before retirement.

Section D: Forest Protective Association Employees Service

Check The box in this section if you meet the following criteria:

- A Tier One/Tier Two active or inactive member can purchase this service time if he/she was an employee of the Forest Protective Association and transferred directly to employment with the Oregon Department of Forestry.
- May purchase all or part of service time if he/she was a member before January 1, 2000, or up to five years if he/she was a member on or after January 1, 2000.
- No minimum service required unless PERS membership was established on or after January 1, 2000; then 60 calendar months of membership is required.
- Eligible purchases can be made anytime before retirement.

You can find out more about purchases on our website at http://www.oregon.gov/PERS/MEM/docs/publications/voluntary_purchases.pdf

Reminder: Make sure you sign and date your purchase request and include any required documentation as noted on this form.



**Oregon
Public
Employees
Retirement
System**

11410 SW 68th Parkway, Tigard OR 97223
Mailing Address – PO Box 23700, Tigard OR 97281-3700
Phone – 503-598-7377 toll free – 888-320-7377
Fax – 503-598-0561 website – <http://oregon.gov/pers>



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Purchase Estimate Request for PERS Service Credit

Section A: Applicant information (Type or print clearly in dark ink. Illegible forms could be returned to you, which could delay your request.)

First name	MI	Last name	PERS number (optional)
Mailing address (street or PO box)			Social Security number*
City	State	Zip	Country
Date of birth (mm-dd-yyyy)			
Day phone number	Evening phone number		Email (optional)

Section B: Effective purchase date

My purchase is effective beginning _____ 1, _____
(month) (year)

Section C: Police and firefighter service credit

See the instructions for criteria needed for this credit.

- [Non-PERS police and fire service time](#) (requires a completed [Certification of Non-Participating Oregon PERS Employer for Police Officer or Firefighter](#))**

Section D: Forest protective association employees service credit

See the instructions for criteria needed for this credit.

- [Forest Protective Association](#) employees service

This form does not entitle you to a benefit estimate.

****Required documents must be included with your request or on file at PERS.**



Signature (do not print)

Date

*Providing your Social Security number (SSN) is voluntary. It will be used for confirmation purposes. If you choose not to supply your SSN, it could take PERS staff longer to process your form. In compliance with the Americans with Disabilities Act, PERS will provide help filling out this form upon request. You can request help by phoning 503-598-7377, toll free 888-320-7377, or TTY 503-603-7766.