



# Oregon

Theodore R. Kulongoski, Governor

## Public Employees Retirement System

Headquarters:  
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[Date]

MEMBER NAME

MEMBER ADDRESS

CITY, ST ZIP

PERS #XXXX

Dear [Recipient's Name]:

This letter explains your recalculated PERS retirement benefit as a result of two 2005 Oregon Supreme Court cases, *Strunk* and *City of Eugene*, and the PERS Board's Settlement Agreement in the *Eugene* case. This letter details the recalculations to your member account, your recalculated monthly benefit, and your total overpayment. We have enclosed a summary of your recalculations for your review.

After making the *Strunk* and *Eugene* recalculations, we determined that you have been overpaid benefits. We calculated the amount of overpayment as follows:

- 1) We totaled the benefits that have been and will be paid to you from your retirement date of [Retirement Date] to the recalculation date of [Adjustment Date].
- 2) We then totaled the monthly benefits you should have received after the *Strunk* and *Eugene* recalculations, including all applicable Cost of Living Adjustments (COLAs), from your retirement date of [Retirement Date] to the recalculation date of [Adjustment Date].
- 3) The difference between what you were paid (number 1, above) and what you should have been paid (number 2, above) is the overpayment amount. Your overpayment amount totals \$XXX.XX.

At this time, there is a lawsuit pending in Multnomah County Circuit Court addressing the issue of whether PERS can collect this overpayment amount from you. Until that suit is resolved, PERS will take no action to collect this overpayment from you. Please do not pay this amount until the courts decide whether you are obligated to do so. PERS will contact you further once the suit is resolved.

PERS will begin to pay your corrected benefit on [Adjustment Date].