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Mailing Address – PO Box 23700, Tigard OR 97281-3700
Toll free – 888-320-7377 Fax – 503-598-0561
Website – <https://oregon.gov/pers>

Tier One/Tier Two Alternate Payee Estimate Request (when former spouse is a Tier One or Tier Two member)

Important: Read instructions before you complete and submit the enclosed form.

General information

- Type or print clearly in dark ink. Illegible forms may be returned, which could delay your request.

Section A: Alternate payee (AP) information

Fill in the AP information section completely.

- Enter your Social Security number (SSN) and your PERS ID. If you do not know your PERS ID, leave the PERS ID field blank. Your PERS ID can be found on your annual statement(s). Providing your SSN is optional; however, providing at least one of these IDs assists in locating your account.
- Enter your mailing address. If you recently moved and you are:
 - currently employed in a PERS-covered position, you must inform your employer of your new address.
 - not employed in a PERS-covered position, complete the [Information Change Request](#) form.
- Enter your date of birth.
- Enter your home, work, and cell phone numbers including the area codes. Include an extension number if you have one.
- Enter your personal email address. Confirmation and follow-up letters are sent via email whenever possible.

Section B: Residency information

Please check the box that reflects whether you expect to be a resident of the state of Oregon when you begin to receive your retirement benefit. Your estimated benefit will be calculated based on your expected residency. Therefore, providing your expected residency will result in a more accurate benefit estimate.

Note: Your state residency at the time you receive benefits may affect a portion of your benefits. You will be required to certify your residency when you apply for benefits.

Section C: Retirement dates

Two estimates will be provided free of charge in a calendar year. We can only provide estimates for retirement dates within the upcoming 24 months.

The retirement date must be after the date you submit this request.

We are unable to advise exactly when your request will be processed. PERS processes many written benefit estimate requests in retirement date order, with the earliest retirement dates first. Estimate processing time may vary from member to member as each account is different.

Enter the month and year you wish to retire as an alternate payee. You cannot retire your alternate payee account until your former spouse reaches their earliest retirement eligibility date. Retirement dates are always on the **first of the month**. You can use only one date per estimate request.

If you do not know the member's earliest retirement eligibility date leave that box blank.

For general service members, early retirement age is 55. For police and firefighter members, early retirement age is 50. A member is eligible to retire the first of the month after the month in which they reach early retirement age.

Section D: Member information

Enter your former spouse's name and their year of birth.

Section E: Signature

Sign the form, and mail to PERS at PO Box 23700, Tigard OR 97281-3700, or fax it to Member Services at 503-598-0561.

