

Pursuant to Indiana Code 4-1-8-7, as an exempt organization, the Indiana Public Retirement System (INPRS) is required to inform the General Assembly of the forms and reports that require member social security numbers. Social Security numbers are required by INPRS because of Internal Revenue Service filing requirements.

**INPRS forms with complete Social Security numbers**

**For Members of any fund**

- W-4P: Federal Income Tax Withholding -- download from IRS Web site
- WH-4P: State Income Tax Withholding -- download from Indiana Commission on Public Records Web site
- Date of Birth Affidavit (State Form 49290)
- Affidavit for Court Appointed Guardian (State Form 44513)
- Death Report (State Form 50790)

**For Members of the Public Employees' Retirement Fund - PERF Hybrid Plan**

- Annuity Savings Account (ASA) Quarterly Member Statement Opt-In (State Form 55048)
- Application for Court Appointed Guardian of a Surviving Dependent Retirement Benefit (State Form 44513)
- Application for Consent to Transfer (State Form 48839) (State F
- Application for Rollover Savings Account (State Form 55180)
- Application for Survivor Benefits for a Spouse Only Eligible for Deceased Member's Pension (State Form 46185)
- Application for Surviving Dependent Pension Benefit (State Form 50869)
- Application for Survivor Benefits for a Dependent Eligible for Deceased Member's Pension and Annuity Savings Account (State Form 54055)
- Application for Survivor Benefits for a Spouse Eligible for Deceased Member's Pension and Annuity Savings Account (State Form 3424)
- Beneficiary Designation Form (State Form 01856)
- Claim for Annuity Savings Account Distribution Because of Death for an Estate or Designated Beneficiary other than Spouse (State Form 52145)
- Claim for Annuity Savings Account Distribution Because of Death for a Spouse as Designated Beneficiary (State Form 35193)
- Date of Birth Affidavit (State Form 49290)
- Election to Continue or Discontinue Receiving Benefits (Elected Officials-State Form 49286)
- Employer Certification of School Service (State Form 47718)
- Member Data Change (State Form 43567)
- Participation Election for School Corporation Employees (State Form 28105)
- Application for Retirement (online application -VOYA)
- Application for Retirement Benefits RMD (State Form 53709)

- Request for Estimate of Benefits (State Form 29211)
- Request to Purchase Out of State Service (State Form 48789)
- Request for Service Credit Review (State Form 52370)
- Retired Member Change of Beneficiary and/or Pension Option (State Form 49518)
- Rollover Acceptance Form for PERF and TRF (State Form 54767)
- Rollover Contribution Form (State Form 56781)
- Small Estate Affidavit (State Form 49284)
- Voluntary Post-Tax Contributions for Annuity Savings Account (State Form (50895)
- Wage and Contributions Adjustment Sheet (State Form 47742)
- Withholding Election For Payees of Death Settlement or Distribution Payment (State Form 7993)

### **For Members of the PERF My Choice Retirement Savings Plan**

- Beneficiary Designation Form (State Form 55178)
- Rollover Contribution Form (State Form 55180)
- Rollover Savings Account Application and Allocation (State Form 55180)
- Voluntary Post-Tax Contributions to Defined Contribution Account (State Form 50895)

### **For Members of the Teachers' Retirement Fund**

- Annuity Savings Account (ASA) Quarterly Member Statement Opt-In (State Form 55048)
- Affidavit For Court-Appointed Guardian of a Surviving Dependent Pension Benefit (State Form 44513)
- Affidavit for Direct Deposit of Retirement Benefit to a Revocable Trust (State Form 54795)
- Small Estate Affidavit for Estate Valued at \$50,000 or Less (State Form 54794)
- Application for Consent to Transfer (State Form 48839)
- Application for Surviving Dependent Pension Benefit (State Form 44513)
- Beneficiary Designation (State Form 52332)
- Date of Birth Affidavit (State Form 49290)
- Election to Begin, Continue or Discontinue Retirement Benefits (State Form 54275)
- Five-Year Distribution Of The Annuity Savings Account To A Deceased Member's Surviving Beneficiary (State Form 54305)
- Irrevocable Election to Begin, Continue or Discontinue Retirement Benefits (State Form Number 54275)
- Irrevocable Payroll Deduction Authorization for Pre-Tax ASA (State Form 52595)
- Lump Sum Distribution Election for Surviving Spouse (State Form 53931)
- Member, Beneficiary and Survivor Affidavit of Date of Birth (State Form 49290)
- Member Data Change (State Form 43567)
- Retirement Application (online application - VOYA)
- Retired Member Change of Beneficiary and/or Pension Option (State Form 49518)
- Request for Service Credit Review (State Form 52370)
- Rollover Acceptance Form for PERF and TRF (State Form Number 54767)
- Rollover Contribution (State Form 52178)

- Rollover Savings Account Acceptance and Allocation (State Form Number 52178)
- Small Estate Affidavit for Estate Valued at \$100,000 or Less (State Form 54794)
- Social Security Consent Form (State Form 50824)
- Voluntary Post-Tax Contributions to Annuity Savings Account (State Form 50895)
- Withholding Election for Payees of Death Settlement or Distribution Payments (State Form 7993)

#### **For Members of the TRF MyChoice Plan**

- Beneficiary Designation (State Form 56777)
- Rollover Contribution (State Form 56770)

#### **For Members of the 1977 Police Officers' and Firefighters' Pension and Disability Fund**

- Application for Designation of Beneficiary - Active Members (State Form 54276)
- Application for Membership in the 1977 Police Officers' and Firefighters' Pension and Disability Fund (State Form 4928)
- Application for Participation in Deferred Retirement Option Plan (State Form 51145)
- Application for Retirement Benefits (online application - VOYA)
- Application for Survivor Benefits (State Form 7045)
- Claim for \$12,000 Lump Sum Death Benefit for Spouse (State Form 53684)
- Claim for \$12,000 Lump Sum Death Benefit for Non-Spouse (State Form 53685)
- Claim for Public Safety Officer Line of Duty Death Benefit for Spouse or Child as Beneficiary or Dependent Parent (State Form 51014)
- Marital Status Form to be filed with Retirement Application (State Form 53769)
- Request to Purchase Service Credit In Other Indiana Public Retirement Funds (State Form 54377)
- Request for Service Credit Review (State Form 52370)
- Rollover Acceptance for Service Purchase (State Form 56313)
- Transfer Under The Indiana Uniform Transfer To Minors Act (State Form 53674)
- Small Estate Affidavit (State Form 54794)
- Survivor Payee Election for Payment of Deferred Retirement Option Plan (State Form 57187)
- Election for Payment of Disability Deferred Retirement Option Plan (State Form 57188)

#### **For Members of the Judges' Retirement System**

- Judges' Retirement System Application for Retirement Benefits (online application – VOYA)
- Judges' Retirement System Application for Survivor Benefits (State Form 7095)
- Judges' Retirement System Claim for Distribution Because of Death for the Spouse of a Member (State Form 51009)
- Judges' Retirement System Claim for Distribution Because of Death for the Beneficiary or Dependent of a Member (State Form 51010)
- Request for Estimate of Benefits/Request to Purchase Service (State Form 53712)
- Application for Beneficiary Designation (State Form 56255)

- Request for Service Credit Review (State Form 52370)
- Small Estate Affidavit (State Form 54794)

### **For Members of the Legislators' Retirement System**

- Application for Survivor Benefits - Legislators' Retirement System Defined Benefit Plan (State Form 53761)
- Application for Retirement Benefits - Legislators' Retirement System Defined Benefit Plan (State Form 44443)
- Request for Service Credit Review (State Form 52370)
- Beneficiary Designation (State Form 56775)
- Rollover Contribution (State Form 56772)

### **For Members of the Prosecuting Attorneys' Retirement Fund**

- PARF Application for Retirement Benefits (online application – VOYA)
- PARF Application for Survivor Benefits (State Form 53670)
- PARF Claim for Distribution Because of Death for the Spouse of a Member (State Form 51007)
- Request for Service Credit Review (State Form 52370)
- Application for Beneficiary Designation For Active Member (State Form 56256)

### **For Members of the Excise Police, Gaming Agent, Gaming Control Officer and Conservation Enforcement Officers' Retirement Plan**

- Application for Change of Beneficiary Active Member, Employee Contribution Account (State Form 53962)
- Application for Participation in the Deferred Retirement Option Plan (State Form 53688)
- Excise, Gaming and Conservation Plan Application for Retirement Benefits (online application – VOYA)
- Excise, Gaming and Conservation Plan Application for Survivor Benefits (State Form 53663)
- Excise, Gaming and Conservation Plan Claim for Distribution Because of Death Estate or Beneficiary other than Spouse (State Form 51017)
- Excise, Gaming and Conservation Plan Claim for Distribution Because of Death for the Spouse of a Member (State Form 51018)
- Excise, Gaming and Conservation Plan Request to Purchase Prior Military Service (State Form 54072)
- Request for Service Credit Review (State Form 52370)
- Small Estate Affidavit (State Form 54794)
- Survivor Payee Election for Payment of Deferred Retirement Option Plan (State Form 57187)
- Election for Payment of Disability Deferred Retirement Option Plan (State Form 57188)

### **For State Employees Line of Duty Death Benefit**

- Claim For State Employee Line of Duty Death Benefit For a Spouse or Dependent Child as Beneficiary (State Form 55761)

### **Public Safety Officers' Line-of-Duty Death Benefit**

- Claim for Public Safety Officer Line of Duty Death Benefit for Spouse, Child, or Dependent Parent as Beneficiary (State Form 51014)

### **Retired Medical Benefits Account Plan Retired Participants**

- Retired Medical Benefits Account Plan Claim Form (State Form 52983)
- Retiree Contact Information Form (Key Benefits Administrators Form 980)
- Direct Deposit Authorization (Key Benefits Administrators Form 980)
- Anthem Premium Automatic Payment Authorization Form (Key Benefits Administrators Form 980)
- Account Transfer Form (Key Benefits Administrators Form 980)

### **Governor and Surviving Spouse's Pension Plan**

- Application for Retirement, Survivor Benefits or Survivor Change (State Form 57036)

### **Internal Reports Used by INPRS to Carry Out Administration of the Funds**

1. Notification of New Hires
2. Member Employer Service Report/Member Service Record
3. Annuity Savings Account Report
4. Deferred Accounts Report
5. Reserve Charge Report
6. Temporary Account Report
7. Employers Not Reporting Report
8. Authorized Payments Report
9. Participant data files required to administer the Retired Medical Benefits Account Plan