

**Indiana Public Employees' Retirement Fund**  
**Report Filed with the Indiana General Assembly**  
**December 30, 2010**

**Pursuant to Indiana Code 4-1-8-7**

Reason/Rationale for social security number requirement on forms/applications listed below:  
Because the payment of pension benefits is a taxable event, we must track and report payments to the Internal Revenue Service with the member's social security number.

**For Members of Any PERF-administered Fund**

- [Application to Start/Stop Retirement Benefits to a Revocable Trust](#)
- [Application for Direct Deposit](#)
- [Authorization to Release Confidential Info](#)
- [Beneficiary Affidavit of Date of Birth](#)
- [Change of Address](#)
- [Change of Name](#)
- [Form for Transfers Under the IN Uniform Transfers to Minors Act](#)
- [Member Affidavit of Date of Birth](#)
- [Small Estate Affidavit](#)
- [Survivor Affidavit of Date of Birth](#)

**For Members of the Public Employees' Retirement Fund**

- [Application for Retirement Benefits](#)
- [Application for Rollover Account \(to roll money into PERF\)](#)
- [Application for Change of Beneficiary -- Active Member](#)
- [Application for Surviving Dependent Pension Benefit](#)
- [Application for Survivor Benefits for a Spouse Eligible for Deceased Member's Pension and Annuity Savings Account](#)
- [Application for Survivor Benefits for a Spouse Eligible ONLY for Deceased Member's Pension](#)
- [Application for Survivor Benefits for a Dependent Eligible for Deceased Member's Pension and Annuity Savings Account](#)
- [Claim for Annuity Savings Account Distribution Because of Death for an Estate or Designated Beneficiary other than Spouse](#)
- [Claim for Annuity Savings Account Distribution Because of Death for a Spouse as Designated Beneficiary](#)
- [Election to Begin Receiving Benefits \(Elected Officials age 55 with 20 years of service\)](#)
- [Election to Begin Receiving Benefits \(age 70 with 20 years of service\)](#)
- [Election to Continue or Discontinue Receiving Benefits \(Elected Officials\)](#)
- [Employer Certification of School Service](#)
- [Employer's Report of Separation from Employment](#)
- [Participation Election for School Corporation Employees](#)
- [Request for Estimate of Benefits](#)
- [Request for Estimate - Partial Lump Sum Distribution](#)

- [Request to Purchase Additional Service Credit](#)
- [Request to Purchase Out of State Service](#)
- [Request to Purchase Prior Military Service Credit](#)
- [Retiree Application for Change of Beneficiary and/or Pension Option](#)
- [Voluntary Contributions: Non-state employees ONLY](#)

#### **For Members of the 1977 Police and Fire Fund**

- [Application for Designation of Beneficiary - Active Members](#)
- [Application for Disability Benefits](#)
- [Application for Membership in the 1977 Police Officers' and Firefighters' Pension and Disability Fund](#)
- [Application for Participation in Deferred Retirement Option Plan \(DROP\)](#)
- [Application for Retirement Benefits](#)
- [Application for Survivor Benefits](#)
- [Authorization to Release Confidential Information](#)
- [Claim for \\$12,000 Lump Sum Death Benefit \(for Spouse\)](#)
- [Claim for \\$12,000 Lump Sum Death Benefit \(for Non-Spouse\)](#)
- [Claim for Public Safety Officer Line of Duty Death Benefit for Child as Beneficiary](#)
- [Claim for Public Safety Officer Line of Duty Death Benefit for Spouse as Beneficiary](#)
- [Marital Status Form to be filed with Retirement Application](#)
- [Public Safety Officer Authorization for Insurance Premium Deduction](#)
- [Request for Estimate of Partial Lump Sum Distribution](#)
- [Request to Purchase Prior Military Service Credit](#)
- [Request to Purchase Service Credit In Other Indiana Public Retirement Funds](#)

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

- [Judges' Retirement System Application for Retirement Benefits](#)
- [Judges' Retirement System Application for Survivor Benefits](#)
- [Judges' Retirement System Authorization to Release Confidential Information](#)
- [Judges' Retirement System Claim for Distribution Because of Death for the Spouse of a Member](#)
- [Judges' Retirement System Claim for Distribution Because of Death for the Estate of a Member](#)
- [Judges' Retirement System Claim for Distribution Because of Death for the Beneficiary of Dependent of a Member](#)
- [Magistrate Election to become a Member of the Judges 1985 Benefit System](#)
- [Request for Estimate of Benefits/Request to Purchase Service](#)

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

- [Legislators' Retirement System Defined Benefit Plan Application for Survivor Benefits](#)

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

- [PARF Application for Retirement Benefits](#)
- [PARF Application for Survivor Benefits](#)
- [Authorization to Release Confidential Information](#)

- [PARF Claim for Distribution Because of Death for the Spouse of a Member](#)

#### **For Members of Excise, Gaming and Conservation Plan**

- [Application for Change of Beneficiary \(Active Member, Employee Contribution Account\)](#)
- [Application for Participation in Deferred Retirement Option Plan \(DROP\)](#)
- [Authorization to Release Confidential Information](#)
- [Excise, Gaming and Conservation Plan Application for Retirement Benefits](#)
- [Excise, Gaming and Conservation Plan Application for Survivor Benefits](#)
- [Excise, Gaming and Conservation Plan Membership Application](#)
- [Excise, Gaming and Conservation Plan Claim for Distribution Because of Death Estate or Beneficiary other than Spouse](#)
- [Excise, Gaming and Conservation Plan Claim for Distribution Because of Death for the Spouse of a Member](#)
- [Excise, Gaming and Conservation Plan Request to Purchase Prior Military Service](#)

#### **For Use by Employers in the Public Employees' Retirement Fund**

- [Employer Certification of School Service](#)
- [Employer Certification of Creditable Service & Authorized Leave](#)
- [Employer's Report of a 45-Year Rule Employee](#)
- [Employer's Report of Separation from Employment](#)
- [Employer's Report of Wages and Contributions](#)
- [Participation Election for School Corporation Employees](#)
- [PERF Membership Record](#)
- [Re-employed Retiree Membership Record and Employer Certification of Eligibility](#)
- [Wages Certification - Re-employed Retirees](#)

#### **For Use by Employers in the Non-Public Employees' Funds**

- [1977 Police Officers' and Firefighters Pension and Disability Fund Membership Record](#)
- [Excise, Gaming and Conservation Fund Membership Record](#)