MARYLAND STATE RETIREMENT AGENCY
120 EAST BALTIMORE STREET
BALTIMORE, MD 21202-6700

APPLICATION FOR AN ESTIMATE OF DISABILITY RETIREMENT ALLOWANCES

IMPORTANT: To be completed by member: Print in ink or type. If you need assistance in completing this application, telephone a retirement benefits specialist at 410-625-5555 or toll-free 1-800-492-5909.

RETIREMENT USE ONLY

FORM 21A (REV. 7/19)

To be completed by the member*. At actual retirement, if your effective date is other than the first of a month, your monthly retirement benefit will not commence until the first of the month following your selected retirement date. Benefits are paid at the end of each month for the month just ended.
* Application by Surviving Beneficiary: Your surviving beneficiary may be eligible to apply for a benefit if you die within seven days of completing the *Preliminary Application for Disability Retirement* (Form 129) and the Maryland State Retirement Agency receives the form within 30 days of your death. In this situation, your beneficiary should contact the Maryland State Retirement agency for filing instructions.

TYPE OF DISABILITY: (PLEASE CHECK): ☐ **ORDINARY** ☐ **ACCIDENTAL**

SOCIAL SECURITY NUMBER

EFFECTIVE DATE OF RETIREMENT MONTH – DAY – YEAR

DAYTIME TELEPHONE NUMBER – –

NAME
FIRST INITIAL LAST

ADDRESS
NUMBER AND STREET

CITY STATE ZIP CODE

EMAIL ADDRESS:

RETIREMENT ALLOWANCES: If you name a beneficiary, you will receive an estimate for the Basic Allowance and all option allowances (1-6). If no beneficiary is named, you will receive an estimate for the Basic Allowance and Options 1 and 4 only. Remember, once your first retirement check is paid, you may not change your allowance option.

IF OPTION 2, 3, 5 or 6 IS REQUESTED INDICATE:

Relationship (check): Spouse ____ Disabled child ____ Other ____

Beneficiary's Date of Birth – –

Beneficiary's Gender

Beneficiary's Name

If electing Option 2 or 5, you cannot designate a beneficiary who is more than 10 years younger unless the beneficiary is your spouse or disabled child.

BASIC: The Basic Allowance pays you the largest possible amount of money each month until your death. All monthly payments stop at your death. After your death, your beneficiary or estate will receive one payment if your death occurs on the 16th of the month or later.

OPTION 1: Provides a lower monthly benefit than the Basic Allowance, but guarantees monthly payments that equal the total of your retirement benefit's Present Value. The Present Value of your benefit is figured at the time of your retirement. If you die before receiving monthly payments that add up to the Present Value, the remaining payments will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.

OPTION 2: Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit will continue to be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

OPTION 3: Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death one half of the monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. No further payments will be made after the deaths of you and your beneficiary. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

OPTION 4: Provides a lower monthly benefit than the Basic Allowance, but guarantees the return of your accumulated contributions and interest as established when you retire. If you die before you have recovered the full amount of your accumulated contributions and interest, the remainder will be paid in a lump sum to your designated beneficiary or beneficiaries who remain alive.

OPTION 5: Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death the same monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. It also provides that your monthly benefit will "pop-up" to the Basic Allowance for your lifetime if your beneficiary dies before you. If your original beneficiary dies and you are collecting the Basic Allowance and decide to name a new beneficiary, your benefit will be recalculated under Option 5 based on the new beneficiary designation. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

OPTION 6: Provides a lower monthly benefit than the Basic Allowance, but guarantees that after your death one half of the monthly benefit paid to you will be paid to your surviving beneficiary for his or her lifetime. It also provides that your monthly benefit will "pop-up" to the Basic Allowance for your lifetime if your beneficiary dies before you. If your original beneficiary dies and you are collecting the Basic Allowance and decide to name a new beneficiary, your benefit will be recalculated under Option 6 based on the new beneficiary designation. If you choose this option, you must send proof of your beneficiary's date of birth with your final retirement application.

Do you wish to purchase any previous service for which you are eligible? ( ) YES ( ) NO
If yes, obtain a request to purchase previous service from your retirement coordinator and attach a copy with this application.

Member's Signature

Date