



## The I'm-Ready-to-Retire Form

Date: \_\_\_\_\_

Dear Andrews University Human Resources Office:

*(The first day of the month in which you reach retirement eligibility OR the first day of the month after your last work day)*

I am requesting Direct Deposit of my monthly benefit	Yes	No
I have qualifying military service	Yes	No
I have opted-out of Social Security	Yes	No
I am an ordained minister and would like to apply for the Parsonage Allowance Exclusion	Yes	No
I am applying for Healthcare Assistance (SHARP) (eligible with 15 years of service or more)	Yes	No

### My Selections:

Base Option	(\$35 per month per person)	Yes	No
Dental/Vision/Hearing	(\$60 per month per person)	Yes	No
Prescription Drugs	(\$115 per month per person)	Yes	No
Medicare Extension	(\$145 per month per person)	Yes	No

**My Spouse's Selections (if applicable):**

Base Option	(\$35 per month per person)	Yes	No
Dental/Vision/Hearing	(\$60 per month per person)	Yes	No
Prescription Drugs	(\$115 per month per person)	Yes	No
Medicare Extension	(\$145 per month per person)	Yes	No

I am: single    married    divorced    widowed. (circle one)

*If not married, disregard the remainder of the form and sign at the bottom.*

My spouse's name: \_\_\_\_\_ SSN: \_\_\_\_\_

DOB: \_\_\_\_\_ Date of Marriage: \_\_\_\_\_

*If married:*

I would like to waive the Joint & Survivor benefit and  
elect single life. Yes                  No

How many of your pre-2000 church years of service  
were you married to current spouse? \_\_\_\_\_ years

I am applying for a Spouse Allowance  
(eligible with 20 years of service) Yes                  No

My spouse is receiving retirement benefits from  
another employer now. Yes                  No  
If yes, monthly amount: \$ \_\_\_\_\_

My spouse will qualify for benefits from another  
employer-provided retirement plan in the future. Yes                  No  
If yes, when? \_\_\_\_\_

My spouse received/will receive a pension(s) in a lump-sum  
distribution from the SDA Retirement Plan  
or another employer. Yes                  No  
If yes, date accessible: \_\_\_\_\_  
If yes, amount: \$ \_\_\_\_\_

That is it for now. Thank y