

2007 Annuity Supplement Earnings Report

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| U.S. Office of Personnel Management Retirement Surveys & Students Branch 1900 E Street, NW Washington, DC 20415-3562 | |
| Claim Number | <i>For Agency Use Only</i> |
| | <input type="radio"/> I <input type="radio"/> II <input type="radio"/> III <input type="radio"/> IV |
| Date | Case Name |

Complete and return this form if your allowable earnings were more than \$12,960.00 or if your FERS Annuity Supplement was reduced in a previous year.

The annuity supplement part of your FERS benefit is subject to an earnings test similar to the one applied to social security benefits and uses the same exempt amount, as required by law in 5 U.S.C. Section 8421a. Your annuity supplement will be reduced \$1.00 for every \$2.00 by which you exceed the exempt amount (\$12,960.00 for 2007). By law, this reduction is effective July 1, 2008. We apply the test only to earnings you received in 2007 **after retirement** and after you reach the Minimum Retirement Age (MRA). The exempt amount for 2008 is \$13,560.

Please answer the following questions and return this survey form before May 15, 2008, or as soon as you know the exact amount of your allowable earnings.

- Is your annuity supplement currently reduced because you reported excess earnings in any previous year? Please darken only one oval below.

- If yes, please skip directly to question 6 and report your earnings for 2007 **after retirement**.
- If no, please continue.

- Did you have any earnings in 2007 **after retirement**? If yes, please continue. If no, please discard this form.

- In which of the following categories are you?
 - I was born before 1948. (*Please continue to question 4.*)
 - I was born between 1948 and 1952. (*Please skip to question 5.*)

- If you were born before 1948 and earned more than \$12,960.00 in 2007 **after you retired**, please skip to question 6 and report all of those earnings.

- If you were born in 1948, consider your retirement date and the date you turned 55 years and 2 months. If you were born in 1949, consider your retirement date and the date you turned 55 years and 4 months. If you were born in 1950, consider your retirement date and the date you turned 55 years and 6 months. If you were born in 1951, consider your retirement date and the date you turned 55 years and 8 months. If you were born in 1952, consider your retirement date and the date you turned 55 years and 10 months.

Please continue to question 6 and report your earnings **after retirement** from whichever of the two dates is later.

- What were your earnings in 2007 **after retirement**?

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| | | | | | | | | | | |
| <i>Dollars</i> | | | | | | | | . | <i>Cents</i> | |

Warning: Your earnings for 2007 will be verified through a computer match with the Social Security Administration's earning file. Any intentionally false statement or willful misrepresentation is punishable by fine, imprisonment, or both (18 U.S.C. 1001).

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|-----------|--------------------------|-------------------|
| Signature | Daytime telephone number | Date (mm/dd/yyyy) |
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Instructions:

1. Read the section below entitled: How To Determine Amount of Earnings You Should Report. If you have questions, please telephone (202) 606-0249 Monday through Friday between 9:30 AM and 5:00 PM, Eastern Time.
2. Provide clear and legible information. Do not detach any portion of this form.
3. Fill in, sign, and mail this report in the envelope provided, or mail the report to: U.S. Office of Personnel Management, Retirement Surveys and Students Branch, FERS Annuity Supplement Survey, 1900 E St., NW, Washington, DC 20415-3562 or fax your response to (202) 606-0022.
4. Retain copies of evidence supporting your claimed earnings in the event you are required to furnish documentation of earnings.
5. DO NOT include your annuity payments from OPM. Include, as earnings, all income from wages and self-employment that you actually received plus deferred income you actually earned during 2007.

How To Determine The Amount of Earnings You Should Report

Include as earnings:

- All wages from employment covered by social security.
- All cash pay for agricultural work, domestic work in a private home, service not in the course of your employer's trade or business.
- All pay, cash or non-cash, for work as a home worker for a non-profit organization, no matter the amount. (The social security \$100.00 tax test does not apply.)
- All pay for work not covered by social security, if the work is done in the United States, including pay for:
 - Family employment,
 - Work as a student, student nurse, intern, newspaper and magazine vendor,
 - Work for States or foreign governments or instrumentalities, and
 - Work covered by the Railroad Retirement Act.

Regardless of what income is called or who receives it, if it is actually wages for services you performed or net earnings from self-employment you secured, it must be included in applying the earnings test.

Do not include as earnings:

- Pensions or annuities paid as retirement income, including your FERS benefit or any benefits received as a survivor.
- Monies which you earned before entitlement for annuity supplement and/or received for annual leave upon retirement. This includes separation incentives.
- Unemployment compensation.
- Gifts, insurance proceeds, inheritances, scholarships, alimony, capital gains, net business losses, prize winnings.
- Payments-in-kind for domestic service in the employer's private home, for agricultural labor, for work not in the course of the employer's trade or business, or the value of meals and lodging.
- Rentals from real estate which cannot be counted in earnings from self-employment because, for instance, you were not a real estate dealer.
- Interest and dividends not resulting from trade or business.
- Pay for Veteran's training and for jury duty.
- Payments by an employer which are reimbursement specifically for your travel expenses and which are so identified by the employer at the time of payment and/or reimbursement or allowance for moving expenses, if they are not counted as wages for social security purposes.

For more information about the Annuity Supplement, refer to Information for FERS Annuitants, RI 90-8. Information begins in Part B. If you would like a copy of this booklet, call FERS Division at (202) 606-0071 or write: U.S. Office of Personnel Management, FERS Division, Room 4457, Washington, DC 20415. Remember your annuity supplement will stop at the end of the month you reach age 62 or the month before you become entitled to social security benefits, whichever is earlier.

Privacy Act Statement/Public Burden Statement

Information you furnish will be used to determine your eligibility to continue receiving the annuity supplement and the amount of the supplement. Information may be shared and is subject to verification via paper, electronic media, or through use of computer matching programs, with national, state, local, or other benefit paying agencies in order to determine and issue benefits under their programs, to obtain information necessary for continuation of benefits under this program, or to report income for tax purposes. It may also be shared and verified, as noted above, with law enforcement agencies when they are investigating a violation or potential violation of civil or criminal law. Solicitation of this information is authorized by the Federal Employees' Retirement Law (Chapter 84, title 5, U.S. Code). Provision of this information is voluntary; however, failure to supply accurate information may result in suspension of your annuity benefit.

We think providing this information takes an average 15 minutes per response, including the time for reviewing instructions, getting the needed data, and reviewing the requested information. Send comments regarding our estimate or any other aspect of this form, including suggestions for reducing completion time, to the United States Office of Personnel Management, OPM Forms Officer, (3206-0194), Washington, DC 20415-7900. The OMB Number, 3206-0194, is currently valid. OPM may not collect this information, and you are not required to respond, unless the number is displayed.