

2020 Annuity Supplement Earnings Report

U.S. Office of Personnel Management Retirement Surveys & Students Branch 1900 E Street, NW Washington, DC 20415-0001	
Claim Number	<i>DOB</i>
Date	Case Name



Complete and return this form if your allowable earnings were more than \$18,240 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 (*\$18,240 for 2020*). By law, this reduction is effective July 1, 2021. We apply the test only to earnings you received in *2020 after retirement* and after you reach the Minimum Retirement Age (MRA). Air Traffic Controller (ATC) Instructors and Supervisors' are excluded. The exempt amount for 2021 is \$18,960.

Please answer the following questions and return this survey form within 30 days from the date on this survey but no later than June 30, 2021.

1. Is your annuity supplement currently reduced because you reported excess gross work earnings in a previous year?
 - Yes (*Please skip directly to question 4 and report your gross work earnings for 2020.*)
 - No (*Please continue to question 2.*)
2. Did you have any earnings in *2020 after retirement*? **Note:** Only full-time contracted ATC Instructor and Supervisor gross work earnings are exempt from being reported.
 - Yes (*Please continue to question 3.*)
 - No (***Do not return this form.*** *You may throw it away or keep it for your records.*)
3. Refer to the chart below to find out what you should report based on your year of birth.

Year of Birth	What You Should Report
1959 - 1963	Report all 2020 gross work earnings <i>after retirement</i> , if your earnings were more than \$18,240.
1964	Report all 2020 gross work earnings <i>after retirement</i> and <i>after you turned 56 years old</i> , if your earnings were more than \$18,240.

4. What were your gross work earnings in *2020 after retirement*? **Note:** Exclude ATC Instructor and Supervisor wages.

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

Warning: Your earnings for 2020 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).

Signature	Daytime telephone number	Email address	Date (mm/dd/yyyy)
-----------	--------------------------	---------------	-------------------

Instructions:

1. Read the section below entitled: How To Determine The Amount of Earnings You Should Report. If you have questions, please telephone 1-888-767-6738 Monday through Friday between 7:40 AM and 5:00 PM, Eastern Time. Hearing impaired users should utilize the Federal Relay Service by dialing 711 or their local communications provider to reach a Communications Assistant.
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, Room 2416, Washington, DC 20415-0001 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 **or any 2020 ATC Instructor and Supervisor wages**. Include, as earnings, all income from wages and self-employment that you actually received plus **deferred** income you actually earned during 2020.

How To Determine The Amount of Earnings You Should Report

Include as earnings:

- All gross 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:

- ATC Full-time Contracted Instructor pay excluded as of 1/1/2020 through 12/30/2020.
- 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 the Retirement Information Office toll free at 1-888-767-6738; hearing impaired users should utilize the Federal Relay Service by dialing 711 or their local communications provider to reach a Communications Assistant; or write: U.S. Office of Personnel Management, Post Office Box 45, Boyers, Pennsylvania 16017. This booklet is also available on the OPM website at www.opm.gov/retirement-services/publications-forms/pamphlets/RI90-8.pdf. 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

Pursuant to 5 U.S.C. § 552a(e)(3), this Privacy Act Statement serves to inform you of why OPM is requesting the information on the form. **Authority:** OPM is authorized to collect the information requested on this form by 5 U.S.C., Chapter 84, Section 8421 and 5 CFR 842.504. **Purpose:** OPM is requesting this information in order to determine your eligibility to continue receiving the annuity supplement and the amount of the supplement. **Routine Uses:** The information on this form may be shared externally as a "routine use" to other Federal agencies and third-parties when it is necessary to determine your eligibility. For example, OPM may share your information with other Federal, state, or local agencies and organizations in order to determine benefits under their programs, to obtain necessary information for an eligibility determination, or to report income for tax purposes. OPM may also share your information with law enforcement agencies if it becomes aware of a violation or potential violation of civil or criminal law. A complete list of the routine uses can be found in the OPM/CENTRAL 1 Civil Service Retirement and Insurance Records system of records notice, available at www.opm.gov/privacy. **Consequences of Failure to Provide information:** Providing this information is voluntary; however, failure to supply accurate information may result in suspension of your annuity benefit.

Public Burden Statement

We estimate 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, Retirement Services Publications Team, (3206-0194), Washington, DC 20415-0001. 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.