



P.O. Box 44213, Baton Rouge, LA 70804-4213
225.922.0600 · Toll-Free 1.800.256.3000

Check one:

Visitor Information Sheet

- Scheduled Appointment - in person
 Scheduled Appointment - phone
 Scheduled Appointment - video
 Walk-In (no scheduled appointment)
 Visitors without appointments will be seen as time permits and may experience a delay.

Member's First Name	Middle Name	Last Name	Today's Date	Social Security Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Visitor's Name (if different than member)

SECTION 1: MEMBER/VISITOR INFORMATION

Mailing Address	City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Daytime Area Code/Phone Number	Evening Area Code/Phone Number	Email Address	Birth Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Would you like your address changed to the above if it does not agree with our records? (Retirees only)
 Yes No

If yes, please sign below: _____ Date

What is your current status?
 Active
 DROP
 Working after DROP
 Retired
 Inactive

Are you currently on Leave Without Pay (LWOP)?
 Yes No

SECTION 2: PURPOSE OF TODAY'S VISIT (Check all that apply)

- | | | |
|--|--|--|
| <input type="checkbox"/> Regular Retirement/IBO Estimate | <input type="checkbox"/> Actuarially Reduced Retirement Estimate | <input type="checkbox"/> Refund of Contributions |
| <input type="checkbox"/> DROP Estimate | <input type="checkbox"/> Disability Retirement Estimate | <input type="checkbox"/> Purchase of Service |
| <input type="checkbox"/> After DROP Estimate | <input type="checkbox"/> Survivor Benefit Information | <input type="checkbox"/> Tax Withholding Change |
| <input type="checkbox"/> DROP/IBO Account Withdrawal | <input type="checkbox"/> Rehired Retiree Return to Work | |
| <input type="checkbox"/> Other _____ | | |

LASERS OFFICE USE ONLY

LASERS Staff Member:

VISITOR CHECKLIST - LASERS OFFICE USE ONLY

Member's Name

Social Security Number

Date of Appointment

Analyst's Initials

VISITOR INFORMATION SHEET:

- Type of retirement (DROP, Service, IBO, Actuarially Reduced, Disability, After DROP, Rehired Retiree) Beneficiary (Service, DROP/IBO)
- Retirement date (discuss best date for member) Leave (explain 300 hrs/200 hrs of sick if applicable)

DISCUSS ESTIMATES (remember to image all estimates) AND EXPLAIN EACH PORTION OF ESTIMATE:

- Retirement date - if DROP, explain 60 day window and 36 month participation
- Leave (current balance provided by member) Currently on Leave without pay (LWOP)?
- FAC (what we used to come up with average)
- Retirement calculation to get benefit
- Explain each portion of the estimate, reviewing the different options available
- DROP estimate
- While in DROP (Work vs. Retirement System)
 - Discuss estimate for the 3 yr comparison for IBO
 - Explain positive and negative aspects for IBO and DROP
- IBO/Regular estimate
- Explain IBO (where money comes from) & how to utilize IBO chart to calculate lump sum amounts
- Actuarially Reduced Retirement estimate
- Disability estimate
- Explain approval process
 - Earnings limits
 - APS
- Self Funded COLA - include in all estimates along with explanation of how it works and System Generated COLA's
- After DROP estimate
- Rehired Retiree estimate
- Leave Review Leave Chart
- Lump sum payment
 - Rollover
 - Conversion to service
- Tax implications
- LA state tax exempt: Sched. E
 - 20% for lump sums and possible 10% penalty - option to rollover leave lump-sum payment
 - Money reported as income
 - SDP - State tax exemption and loss of exemption

EXPLAIN RETIREMENT TIMELINE:

- 45 days until preliminary benefit (all required documents must be received before a benefit is payable) and 120 days for final
- IBO rollover time period and leave payment

REVIEW THE RETIREMENT READINESS GUIDE:

- myLASERS - how to register and the benefits
- Social Security and Medicare information Required Forms Required Documents
- DROP/IBO account SDP and how to contact Empower Updating DROP/IBO beneficiary at Empower
- Insurance deductions - how it is set up, pay 1 - 2 months in advance, HR is always the point of contact and why
- Credit unions & RSEA
- Re-employed Retiree Options
- Retirement Education
- Member Organization Tools