



## Special Election to Repay Traditional Plan Survivor Refund

This form is to be used by a SURS annuitant to request the lump-sum cost to repay the refund or additional annuity consisting of accumulated survivor contributions, plus applicable interest from the date the refund was issued, or the date each additional annuity payment was issued to the date of repayment.

To be eligible, a SURS annuitant must meet the following requirements:

- Retired before June 1, 2011, and received a refund or additional annuity equal to the amount of his or her survivor contributions at retirement; **and**
- Party to a: (1) civil union or legal relationship that is recognized in Illinois as a civil union or marriage on or after June 1, 2011; (2) marriage on or after Feb. 26, 2014; or (3) marriage, civil union, or other legal relationship that was not recognized in Illinois as a civil union or marriage until June 1, 2011, a marriage until Feb. 26, 2014, or both.

Sample repayment amounts assuming an interest rate of 7.25 percent and a repayment date in May 2017:

**Example 1:** A Survivor Refund of \$20,000 issued in August 1995 would cost approximately \$91,700.

**Example 2:** A Survivor Refund of \$20,000 issued in June 2009 would cost approximately \$34,800.

I, \_\_\_\_\_, hereby apply to repay the refund or additional annuity consisting of  
(print name)  
accumulated survivor contributions plus applicable interest in accordance with 40 ILCS 5/15-154(c-5). I understand that this election to make contributions is irrevocable once payment has been submitted to SURS and that the payment must be submitted by the earlier of 24 months from the date of this election or the date of my death. **I have enclosed proof of the valid marriage, civil union or legal relationship that meets the criteria listed above.**

\_\_\_\_\_  
Member ID or  
last four digits of S.S. #

\_\_\_\_\_  
Annuitant Signature

\_\_\_\_\_  
Date

Please return completed form and supporting documentation to SURS at **1901 Fox Drive, Champaign, IL 61820** or via fax at **217-378-9800**, on or before **December 28, 2017**.

This form should be completed and returned to SURS along with proof of the valid marriage, civil union or legal relationship if the annuitant wishes to request the cost to repay the survivor refund. This form and the supporting documentation must be received by SURS **between Dec. 29, 2016, and Dec. 28, 2017**. Upon receipt of this completed form, SURS will calculate the cost information in accordance with 40 ILCS 5/15-154(c-5) and forward it to the annuitant for payment.

Full repayment via rollover or after-tax funds must be made by the earlier of 24 months from the date this form is received by SURS or the date of the annuitant's death. If an annuitant fails to make the repayment in the required period, survivor benefits will not be payable.

**The submission of payment for such contributions is irrevocable even in the event that the marriage, civil union or other legal relationship described above is dissolved, annulled or declared invalid by a court of competent jurisdiction; or the other party to the marriage, civil union or other legal relationship predeceases the annuitant or otherwise fails to qualify as a survivor upon the annuitant's death.**