{stdlongdate} Member ID: {stdMbrPERSLinkID}

{stdMbrFullName}

{stdMbrAdrCorStreet1}

{x stdMbrAdrCorStreet2}

{stdMbrAdrCorCity} {stdMbrAdrCorState} {stdMbrAdrCorZip}

**RE: BENEFIT ESTIMATE WITH PARTIAL LUMP SUM OPTION (PLSO)**

Dear {stdMbrSalutation}:

The purpose of this letter is to confirm your election for the PLSO. Your first monthly retirement benefit and your PLSO will be issued on { FirstPLSOBenefitIssueDate }.

|  |  |  |
| --- | --- | --- |
| Partial Lump Sum Option (PLSO): |  | {PLSOLumpSum} |
| Taxable Portion: |  | {TaxablePortion} |
| Non-Taxable Portion: |  | {Non-TaxablePortion} |
| Federal Income Tax: |  | {FederalTax} |
| North Dakota State Income Tax: |  | {NorthDakotaTax} |
| **Net PLSO:** |  | **{NetPLSO}** |

{x when IsRollover}The lump sum payment will be sent to {stdOrgName}. **As a portion of your rollover includes non-taxable income, then the letter of acceptance from** **{stdOrgName}** **is required. To-date NDPERS has not received a letter from** **{stdOrgName}. Please fax the letter to (701) 328-3920. Due to confidentiality, we cannot advise** **{stdOrgName}** **of the status of your account. Please contact your agent with the above information.** {endblock}

We have a Member Service Unit who can assist you with general questions about NDPERS programs, including updates on program changes. The representatives will also take requests for forms, brochures, and benefit books. If you require additional services outside the scope of Member Services, the representative will be happy to transfer you to the staff member best qualified to assist you.

If you have any questions, please call NDPERS at {stdNDPERSPhoneNumber} or {stdNDPERSTollFreePhoneNumber}.

Sincerely,

NDPERS Benefits Division