

FSPS ANNUITY SUPPLEMENT EARNINGS REPORT

- The annuity supplement part of your FSPS is subject to an earnings test that begins after a retiree reaches the Minimum Retirement Age (MRA-see the chart below). The earnings test is similar to the one applied to Social Security benefits and uses the same annual exempt amount, as required by law in 5 U.S.C. Section 8421a. The exempt amount changes from year to year and can be found at www.ssa.gov. Your annuity supplement will be reduced \$1.00 for every \$2.00 by which your calendar year earnings exceed the exempt amount. The reduction, termination or reinstatement of benefits will become effective January 1st of the year following the year of income reported. Refer to the chart below to find your MRA based on your year of birth.

<i>If you were born...</i>	<i>Your MRA is...</i>
Before 1948	55 years
1948	55 years and 2 month
1949	55 years and 4 months
1950	55 years and 6 months
1951	55 years and 8 months
1952	55 years and 10 months
1953-1964	56 years
1965	56 years and 2 months
1966	56 years and 4 months
1967	56 years and 6 months
1968	56 years and 8 months
1969	56 years and 10 months
1970 or later	57 years

- Refer to the chart on the next page to see which types of income are reportable for the purpose of the earnings test. **Please do not include pre-retirement salary or post-retirement annuity payments.** If you have questions, please telephone the HR Service Center at 866-300-7419 Monday through Friday between 8:00 AM and 5:00 PM, Eastern Time.
- In order for the Department of State to apply the earnings test to your annuity supplement, **you must submit this form by January 10, 2014**, starting the year after you reach your MRA. Submit the form even if you had no earnings for that previous year. **Your annuity supplement will be terminated if the FSPS Annuity Supplement Report is not received on time to establish your eligibility.**
- Please provide clear and legible information. Sign and send the form by one of the following methods:

Mailing Address Department of State, HR Service Center, Annuitant Services, 1999 Dyess Avenue, Building E, Charleston, SC 29405	Fax 843-202-3807	Scan/Email HRSC@state.gov
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- Retain copies of evidence supporting your claimed earnings in the event you are required to furnish documentation of earnings.

How To Determine Which Income to Report

Include as earnings:

- All wages from employment covered by Social Security.
- Net Income from self-employment
- All cash pay for agricultural work, domestic work in a private home, service not in the course of your employer's trade of 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 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, 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 FSPS benefit or any benefits received as a survivor.
- Salary earned before retirement and/or lump-sum payment for annual leave upon retirement. This includes any separation incentives.
- Distributions from our Thrift Savings Plan or Individual Retirement Accounts.
- 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 that 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 military training or 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.

FSPS Annuity Supplement Report

Print Name Clearly	Employee ID or last four digits of SSN
Year of Income	Date Received by HRSC (completed by HRSC)

1. Is your annuity supplement currently reduced or terminated because you reported excess earnings last year? (Darken only one oval.)
 - Yes (Please skip directly to question 3.)
 - No (Please continue to question 2.)
2. Did you have any earnings after retirement and in the year entered above? (Darken only one oval.)
 - Yes (Please continue to question 3.)
 - No (Please sign and return document.)
3. What were your earnings *for the year entered above*?

Dollars

Cents

Warning: Your earnings are subject to verification with the Social Security Administration's earnings file. Any intentional false statement or willful misrepresentation is punishable by fine, imprisonment, or both (18 U.S.C. 1001).

- **Complete and return this form even if you had no earnings for the year indicated in the box above.**
- **Failure to return this form may result in the termination of your annuity supplement.**
- **Please do not include your salary before your date of retirement or any annuity payments.**

Signature	Daytime Phone Number
E-mail address	Date: (mm/dd/yyyy)

Privacy Act Statement	
AUTHORITY	The information is sought pursuant to the Foreign Service Act (22 U.S.C. § 3901 <i>et seq.</i> and 22 U.S.C. § 4071) and E.O. 9397, as amended. 31 U.S.C. § 7701 requires any person doing business with the Federal government furnish a Social Security Number or tax identification number.
PURPOSE	The information solicited on this form will be used to determine your eligibility to continue receiving the annuity supplement and the amount of the supplement.
USES	The information may be shared with national, state or local government, or the Social Security Administration in order to determine benefits and issue benefits under their programs, to obtain information necessary for determination or 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. More information on the Routine Uses for the system can found in the System of Records Notice, State-31, Human Resources Records.
DISCLOSURE	The collection of this information is voluntary, however, failure to provide may result in benefits being denied.