

Application No. 24-14

Retirement Notice and Application

Oklahoma County Retirement System
320 Robert S. Kerr, Oklahoma City, OK 73102
(405) 713-1535

This application is submitted in compliance with Title 19 Chapter 25 Sections 951 – 962 of the Oklahoma State statutes.

1. APPLICANT INFORMATION (Please Print)

Matthews Beverly Ann Social Security Number _____
 Last Name First Middle
 Address _____ City _____ State _____ Zip _____ Date of Birth _____ M/F _____
 Home Phone _____ Department Court Services Work Phone _____ Hire Date 9.14.17 Termination Date 4.12.24
 Spouse Name _____ Date of Birth _____ M/F _____ Social Security Number _____

2. DEFINED CONTRIBUTION

DEFINED BENEFIT

- _____ Resolution #83-76 – Following A, B, C, D and E. **Must have 15 years of service. Must have 10 years of service for disability benefits.**
- _____ Resolution #69-81-Following A, B, C, D and E. **Must have 10 years of service. Must have 10 years of service for disability benefits.**
- _____ Resolution #125-82- Froze retirement prior to March 1, 1983. **Over age 55 with not less than 15 years of service. Must have 10 years of service for disability benefits.**
- _____ Resolution #159-89- **Shall apply to employees retiring or vesting on or after May 9, 1988. Must have 8 years of service. Must have 8 years of service for disability benefits.**

☒ (A) RULE OF 60
(age plus years of service equal sixty)

_____ (A) AGE 62, ADHERING TO PROVISIONS OF RESOLUTION AT TIME OF TERMINATION, LAST 2 YRS CONSECUTIVE.
IMMEDIATELY PRECEDING RETIREMENT. (No longer employed by County)

_____ (B) DISABILITY

_____ (B) NOT AGE 62, ADHERING TO PROVISIONS OF RESOLUTION AT TIME OF TERMINATION, LAST 2 YRS. CONSECUTIVE.
(1st Pension Payment to begin when County employee reaches age 62)

_____ (C) OTHER

_____ (C) AGE 55, ADHERING TO PROVISIONS OF RESOLUTION AT TIME OF TERMINATION, LAST 2 YRS CONSECUTIVE.

_____ (D) RULE OF 80 (age plus years of service equal eighty)

_____ (E) CURRENTLY EMPLOYED AND ADHERING TO PROVISIONS OF RESOLUTION. TOTALLY & PERMANENTLY DISABLED.

3A. HEALTH/DENTAL/VISION COVERAGE CONTINUATION - (Only PPO coverage may be continued)

Continuation only available if covered at time of retirement application and 100% vested)

For Office Use Only
(Rates are subject to change)
Monthly Premium

Family Status
☒ Single
 _____ Family
 _____ Other

Medicare/Medicaid
☒ Applicant
 _____ Spouse
 _____ Dependent

\$ 60.00

3B. ELECTION OR WAIVER OF CONTINUED HEALTH/ DENTAL COVERAGE

☒ I elect to continue health and dental coverage. ☐ I understand I am **NOT** eligible for continued health or dental coverage:
☐ (a) I am not currently covered.
☐ I do **NOT** elect to continue health, dental, and vision coverage. ☐ (b) I am not eligible under the RULE OF 75

4A. LIFE INSURANCE (Only available if hired prior to Feb 1, 1987)

Frozen Life Volume (as of 2-1-87) divided by 2 = \$ _____
X \$1.50 per thousand = \$ _____

For Office Use Only
Monthly Premium
(Rates are subject to change)

\$ _____

4B. ELECTION OR WAIVER OF CONTINUED LIFE COVERAGE

☐ I elect to continue life coverage.

☐ I do **NOT** elect to continue life coverage.

☐ I understand I am **NOT** eligible for life insurance
due to non-continuous coverage.

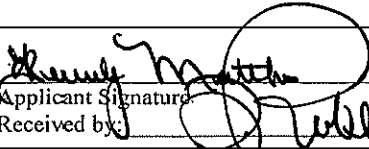
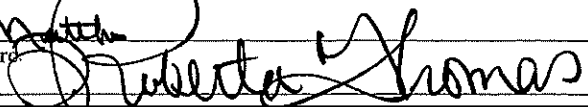
☒ I understand I am **NOT** eligible to continue life coverage
due to my hire date being after February 1, 1987.

5. PREMIUM DEDUCTION AUTHORIZATION

☐ I elect to have the premiums charged by the County deducted from my pension account each month.

☐ I elect to directly pay the County for any premiums due for continued coverage(s). I understand that premiums are due on the first
of the month of coverage and may be canceled if payment is not received by the last day of the month of coverage.

SIGNATURE PAGE

Applicant Signature:  Received by: , Benefits and Retirement, on 3/14/2024
Date: 3/14/24

APPROVED THIS DATE: _____ BY THE OKLAHOMA COUNTY RETIREMENT BOARD.

CHAIRMAN

TREASURER

ATTEST: _____

OKLAHOMA COUNTY RETIREMENT APPLICATION SUMMARY

DEFINED CONTRIBUTION APPLICATION NO.

24-14

DATE OF APPLICATION

3-14-24

DEFINED BENEFIT APPLICATION NO.

BOARD MEETING DATE

3-25-24

Application to receive retirement benefits is submitted to the Board of Trustees of the Employees Retirement System of Oklahoma County as provided by Title 19 and any subsequent resolutions or regulations of the Oklahoma State Statutes.

APPLICANT:	YEARS	MONTHS	DAYS	ROUNDED
Beverly Matthews				
DATE OF HIRE: 9-14-2017	6	6		
DATE OF TERMINATION: 4-12-24				
PREVIOUS OK COUNTY EMPLOYMENT SERVICE CREDIT:				
MILITARY SERVICE CREDIT: (Maximum of 5 years)				
OTHER SERVICE CREDIT: (7yr max for employee service; 4 yr. max. for elected official service) (DB Plan allows credit <u>only</u> for elected officials)				
ACCRUED UNUSED ANNUAL LEAVE: (DC Plan Not To Exceed 30 or 45 days)				
TOTAL SERVICE CREDIT	6	6		7

DATE OF BIRTH:	AGE: 68 (At Retirement Effective Date)	68	1	68
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<u>RETIREMENT BENEFITS</u>	DEFINED BENEFIT	DEFINED CONTRIBUTION
Retirement Effective Date:		4-13-24
Benefit/Vested Percentage:	%	100 %
Monthly Pension to Begin:		N/A
Monthly Pension Amount:	\$	N/A

APPLICANT SIGNATURE:

Beverly Matthews

DATE:

3/14/2024

ATTEST: OKLAHOMA COUNTY BENEFITS AND RETIREMENT

BY BENEFITS & RETIREMENT:

Deborah Thomas

DATE:

3/14/24