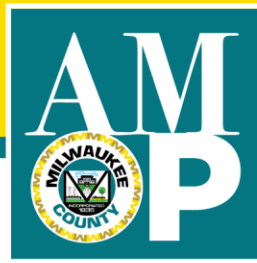


02.06.05 Estimate Request Process



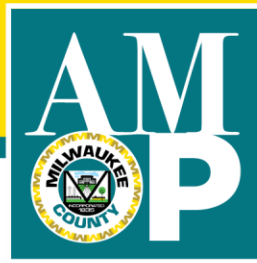
Why This Procedure Is Important

To document Milwaukee County's procedure regarding Estimate process, which will equip members of the Employees' Retirement System of Milwaukee County with the knowledge of what to expect when planning for retirement and how to request estimates for their pension benefit from the Employees' Retirement System (ERS). This AMOP is intended for Milwaukee County employees hired before January 1, 2025, who are eligible for membership in the ERS.



To Whom Does This Procedure Apply?

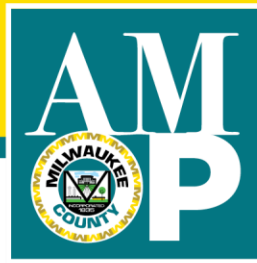
All Milwaukee County pension-eligible employees hired before January 1, 2025, who are eligible for membership in the ERS



Here Is What the Procedure Says:

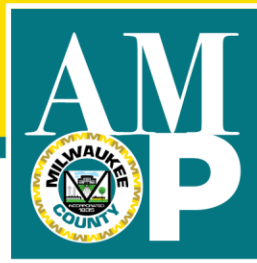
Enroll in Digital Self-Service

- New users must register for Digital Self-Service, which can be done on the home page of the Digital Self-Service site. If a member is having trouble registering, they should call Retirement Plan Services (RPS) at 414-278-4207 to troubleshoot. To reset a password, the member may use the reset password link on the home page of the Digital Self-Service site.
 - An unlimited number of estimates can be run by the member using this online service.
 - These are estimates only and are not a guarantee of benefits.
- Members can reference the Online Pension Estimate Calculator AMOP or the Digital Self-Service estimator training in Dayforce to view procedures on how to estimate their benefit using Digital Self-Service.



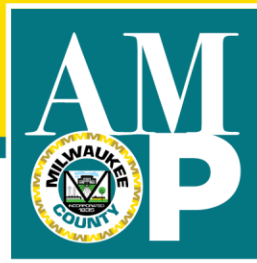
Requesting a Manual Estimate from RPS

- If the member's estimate request falls into a "complex calculation" scenarios, RPS staff will need to prepare a manual estimate. Members that do not fall into one of the "complex calculation" scenarios can also request a manual estimate be completed by RPS.
- "Complex calculations" could include, but are not limited to, the following scenarios:
 - Divorced members who have a Domestic Relations Order
 - Members with Reciprocity
 - Members with service in both ERS and OBRA
 - Members with Military time prior to 1975
 - Members who retired and returned to service
 - Members with Benefit Waivers
 - Members with Service Credit Purchases (sometimes called Buy-ins / Buy-Backs)
 - Members who have been covered by multiple unions during their employment
 - Members with a break in service



Requesting a Manual Estimate from RPS (cont.)

- When requesting a manual estimate, members will be asked to confirm or provide the following information:
 - Anticipated termination and retirement dates
 - Member's date of birth
 - Beneficiary information (including name, date of birth, and relation to the member)
 - BackDROP date, if eligible
 - Member's address
- If a member is ineligible at their requested date, RPS will inform the member of their earliest retirement date.
- RPS will enter the required information into the pension administration system and inform the member of the estimated timing of when the manual estimate will be mailed.
 - Due to the number of calculation requests that RPS receives, manual estimates can take multiple weeks to complete. If there are increased volumes of requests or depending on the complexity of an estimate, manual estimates could take longer than four weeks to complete.



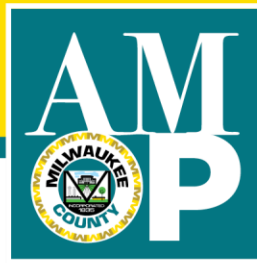
RPS Completes Calculation and Prepares Manual Estimate

- RPS verifies the member's eligibility and calculates an estimated pension benefit using projected service credits through the member's desired termination date and current earnings on file.
- A manual estimate letter is prepared by the Retirement Analyst and submitted along with a manual estimate worksheet for review.
- The member's estimate and letter are peer reviewed by another analyst or manager in RPS for its completeness and accuracy. Once approved, the member's estimate is mailed to the member's address on record. These are estimates only and are not a guarantee of benefits.
 - Due to the volume of estimates requests that RPS receives, manual estimates could take four weeks or longer to complete depending on volumes or the complexity of an estimate.



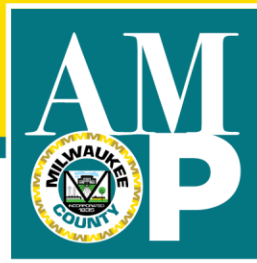
Quiz Questions?

After reviewing the Procedure, you will be asked the following questions to complete the training:



True of False

Members can complete unlimited estimates of their pension benefit using an online estimator tool.



Some estimate requests are more complex in nature and will require RPS staff to complete manual calculations. Which of the following scenarios are considered “complex calculations?”

- A. Reciprocity***
- B. If a member has both ERS and OBRA Service***
- C. If a member has multiple unions in their work history***
- D. All of the above***



True of False

Both active and deferred vested members can access the Pension Estimate Calculator through Milwaukee County's Retirement Plan Services Member Self-Service platform.