

SOP 42B

HR SHARED SERVICE CENTER



RETIREMENT EFFECTIVE DATE  
Acknowledgement of Understanding

The SOP 42B is in support of your application for immediate (optional) retirement – SF2801, *Application for Immediate Retirement (CSRS)*, or SF3107, *Application for Immediate Retirement (FERS)*. Before a personnel action to separate you from the rolls can be processed, you must confirm your decision regarding the effective date of your retirement to ensure that you benefit fully from your pending annuity.

The effective date of your retirement is solely your decision, but you should be aware of possible negative financial consequences of not selecting an ideal effective date. As explained in the paragraphs below, the date your annuity will begin will depend on which day of the month you choose to retire.

Please review the following explanation to be sure you understand how your retirement effective date will affect the date your annuity begins, **initial** the explanation based on your retirement plan, and **sign and date** on the lines indicated below.

For CSRS and CSRS Offset Employees

\_\_\_\_\_ I understand that according to my CSRS or CSRS Offset retirement plan I can retire up to and including the 3<sup>rd</sup> day of any month and my annuity will begin the next day. However, if I elect to retire on the 4<sup>th</sup> day or later in the month, my annuity will begin the 1<sup>st</sup> day of the **next** month. In this case I will receive no pay or annuity payment covering the period from my retirement date until the 1<sup>st</sup> day of the next month.

Based on the retirement date on my application \_\_\_\_\_, my annuity will begin \_\_\_\_\_.

For FERS Employees

\_\_\_\_\_ I understand that according to my FERS retirement plan my annuity will begin on the 1<sup>st</sup> day of the **next** month after the effective date of my retirement. Therefore, if I retire on the last day of the month (30<sup>th</sup> or 31<sup>st</sup>, as applicable) my annuity will begin the next day. However, if I elect to retire on any other day of the month, I will receive no pay or annuity payment covering the period from my retirement date until the 1<sup>st</sup> day of the next month.

Based on the retirement date on my application of \_\_\_\_\_, my annuity will begin \_\_\_\_\_.

Signature \_\_\_\_\_ Date \_\_\_\_\_

EIN: \_\_\_\_\_

Email Address: \_\_\_\_\_