



Society of Former Special Agents of the FBI

3717 Fettle Park Drive
Dumfries, Virginia 22025
(703) 445-0026

IMPORTANT INFORMATION FOR A SURVIVOR ANNUITANT

The important information that you need to have in hand to notify the Office of Personnel Management (OPM) of the death of your loved one and to begin the process to receive a monthly annuity is set forth below.

Please keep this sheet in a safe place. It is not intended to replace the Society's Survivor Guide, but to make sure that your surviving spouse has what he/she needs to immediately begin the process of dealing with OPM.

If you cannot locate your marriage certificate, you can generally send a request to the Bureau of Vital Statistics or County Clerk for the county where you were married. The information as to where and how to make your request is available online on the county website.

1. You should attach to this sheet a copy of your OPM retirement card with CSA number or at least write the CSA# here: _____.
2. Attach a copy of your marriage certificate. It does not need to be a certified copy, but OPM will not process the request for a survivor annuity without a marriage certificate.

These are the two items that survivors often cannot find and that greatly slow down the claims process. All other items can be readily obtained.

Your Society is here to help and should be contacted at (703) 445-0026 when you start the process to claim an annuity.

The All Important CSA Number and Your Federal Annuity

by Nancy Savage (1977-2011), Executive Director

What is a CSA Number?

The CSA number is a number that federal retirees receive when they are provided an annuity at the time of retirement. CSA is an acronym for Civil Service Annuity. The old Civil Service Administration became the Office of Personnel Management (OPM) in 1979. The CSA number basically is the number that the OPM uses to identify the annuitant's retirement file and accrued benefits. It is also referred to by OPM as the annuitant's claim number. Basically think of the CSA number as similar to a Social Security Number (SSN), which identifies someone's Social Security benefits. The CSA number will read CSA followed by a 7 digit number and a suffix of Zero or CSA XXXXXXX 0.

Where do I find my CSA number?

There are three places where you will find your CSA Number.

Retirement Services Reference Card

OPM sends each retiree a small card with the CSA number on it. The card looks similar to a Social Security card. If you cannot find this card, no worries — there are two more places to find that all important number.

Annual Notice of Annuity Adjustment

Your CSA is also included in your OPM Notice of Annuity Adjustment that is sent to every annuitant in hard copy once a year, indicating how much your annuity will be for the upcoming year based on the cost of living increase. (Note this year, annuitants will not be receiving a cost of living increase, but should receive a notice just the same.)

OPM's 1099R

OPM will issue each annuitant in January a paper 1099R which reflects their payment of annuity for the previous year. This 1099R is filed with your federal and state taxes much like a W2 form. The 1099 R form has the CSA number on it under Account number or (Retirement Claim Number).

Survivor Annuity

When the survivor of an annuitant advises OPM of the death of their spouse and files for a survivor annuity, OPM will issue them their own CSF number, which refers to their survivor annuity. The CSF number will consist of CSF followed by seven digits and the letter W as a suffix. It will read CSF XXXXXXX W. The survivor annuitant will receive a Retirement Services Reference Card with a CSF number, Notice of Annuity Adjustment each year and a 1099R.

On Line Account with OPM

When you have either a CSA or CSF number, it is highly recommended that you go to www.opm.gov/retire and establish an on-line account so that you can download your own 1099R form in January, change deductions, etc. OPM is not easy to contact and the online services generally work well once your

account is set up. You can attempt to call them at 1-888-767-6738 between 7:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday. You can also contact them using email at retire@opm.gov.

CSA Number and Your Family

Make sure your spouse and/or person in charge of your estate is knowledgeable about your CSA number.

Annuitant



Survivor Annuity



PAID BY			STATEMENT OF ANNUITY PAID		2014
OFFICE OF PERSONNEL MANAGEMENT RETIREMENT OPERATIONS P.O. BOX 45 BOYERS PA 16017-0045			Copy C - For annuitant's records. This information is being furnished to the U.S. Internal Revenue Service		OMB No. 1545-0119 Form 1099-R Distributions From Pensions, Annuities, Retirement or Profit- Sharing Plans, IRAs, Insurance Contracts, etc.
1. PAYER's Federal Identification	Recipient's ID No. (Annuitant)	Account number (Retirement Claim No.)	CS A111111 0		1. Gross distribution
5. Employee Contributions/ Designated ROTH Contributions or Insurance Premiums	PAID TO				2a. Taxable amount
7. Distribution Codes) 7 - NONDISABILITY				4. Federal Income Tax Withheld	12. State tax withheld
9b. Total Employee Contributions				13. State/Payer's state no.	13. State/Payer's state no.
					NONE

To separate, tear on perforation

PAID BY			STATEMENT OF SURVIVOR ANNUITY PAID		2014
OFFICE OF PERSONNEL MANAGEMENT RETIREMENT OPERATIONS P.O. BOX 45 BOYERS PA 16017-0045			Copy C - For annuitant's records. This information is being furnished to the U.S. Internal Revenue Service		OMB No. 1545-0119 Form 1099-R Distributions From Pensions, Annuities, Retirement or Profit- Sharing Plans, IRAs, Insurance Contracts, etc.
1. PAYER's Federal Identification	Recipient's ID No. (Survivor)	Account number (Retirement Claim No.)	CS F111111 W		1. Gross distribution
5. Employee Contributions/ Designated ROTH Contributions or Insurance Premiums	PAID TO				2a. Taxable amount
7. Distribution Codes) 4 - DEATH BENEFIT				4. Federal Income Tax Withheld	12. State tax withheld
9b. Total Employee Contributions				13. State/Payer's state no.	13. State/Payer's state no.
					NONE

To separate, tear on perforation

CSF #



U.S. Office of Personnel Management
Retirement Services Program

Notice of Annuity Adjustment

CSA #



Dear JAMIE DOE,

Claim Number: CSA 4 111111 0

The amount we are paying you has changed. This letter provides your new monthly annuity rate and information about any adjustment reflected in your April 1, 20xx payment, which pays your annuity for the month of March. Please keep this notice for your records. We will mail you another notice the next time your payment amount changes.

\$ _____ Gross Monthly Annuity

\$ _____ Health Benefits Premiums for SAMBA

\$ _____ The amount of federal income tax withheld from your annuity changed because your annuity amount has changed or you have submitted a revised withholding request.

\$ _____ We are deducting Virginia income tax as you requested

\$ _____ Federal Long Term Care Insurance (LTCFEDS)

\$ _____ NET MONTHLY ANNUITY

SAMPLE

If you have questions about this notice, you may call the Retirement Information Office at 1-888-767-6738 between 7:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday and speak to a Customer Service Specialist. Please call us at 202-606-0500 if you live within local calling distance of Washington, DC. You may also contact us using email at retire@opm.gov.

Go to www.servicesonline.opm.gov to find out how to receive your IRS 1099R, annual mailer and other informational alerts electronically.

A great deal of retirement information is available online at www.opm.gov/retire.

Retirement Services