

Public Employee Retirement System of Idaho (PERSI)

PERSI's Mission:

To provide our members and their beneficiaries with reliable, secure, long-term retirement, survivor and disability benefits as specified by law.

To assist our members in planning a secure retirement by providing high-quality, friendly service, retirement education and information.

[Click here to download the PERSI Member Handbook \(pdf format\)](#)

Go to **www.persi.idaho.gov** for useful and detailed information concerning your PERSI account. You can also contact the Coeur d'Alene office by writing or calling:

2005 Ironwood Pkwy, Suite 226
Coeur d'Alene, ID 83814
1-800-962-8228
(208) 334-3365
Fax (208) 334-3805

You can also view your account history and other useful information by logging on to: **[My Account Information](#)** (first-time users will need SSN and email address)

Useful forms and publications:

Forms for Active Members	
<u>102 - Membership Application</u>	<u>102 Directions</u>
<u>108 - Request for Base Plan Account Withdrawal</u>	<u>108 Instructions</u> <u>108 Withdrawal Tax Information</u> <u>108 - Base Plan Account Withdrawal Important Information</u>
<u>110 - Address Change</u>	Return this completed form to Human Resources
<u>113 - PERSI Durable Power of Attorney</u>	

<u>115 - Beneficiary Designation and/or Member Name Change</u>	<u>115 Instructions</u>
116B Additional Payment Agreement <u>PDF Format</u> or <u>Word Format</u>	
<u>451 - Release of Information</u> <u>451 - Submit on-line</u>	
<u>460 - Alternate Date of Birth Evidence</u>	Use this form if you cannot provide a copy of your Birth Certificate
<u>801 - Choice Plan 401K Enrollment Form</u>	You may make voluntary contributions to the Choice Plan 401(k). To begin contributions, return this form to Human Resources.
<u>803 - Choice Plan 410 (k) Request for Rollover Contribution</u> <u>803 - Choice Plan 410K Request for Rollover Contribution Instructions</u>	The Choice Plan accepts rollover contributions from other qualified retirement plans. Refer to the instruction sheet for more information, and use this request form to make a rollover contribution into your Choice Plan account.

Forms for Inactive Members

<u>108 - Request for Base Plan Account Withdrawal</u>	<u>108 Instructions</u> <u>108 Withdrawal Tax Information</u> <u>108 - Base Plan Account Withdrawal Important Information</u>
<u>448 - Direct Deposit Authorization</u>	

<u>110 - Address Change</u>	Return completed form to HR
<u>113 - PERSI Durable Power of Attorney</u>	
<u>115 - Beneficiary Designation and/or Member Name Change</u>	<u>115 Instructions</u>
<u>451 - Release of Information</u> <u>451 - Submit on-line</u>	
<u>804 - Choice Plan 401K Request for Distribution-Rollover</u> <u>804 - Choice Plan 401K Request for Distribution-Rollover Instructions Special Tax Notice</u> <u>Special Tax Notice</u>	If you are no longer employed by a PERSI employer, you may receive your funds from the Choice Plan. Refer to the instruction sheet for more details, and use this request form to make a distribution or request a rollover from you Choice Plan account. The Special Tax Notice explains the tax consequences of taking a distribution from your retirement plan.

Forms for Retired Members	
<u>110 - Address Change</u>	Return this completed form to HR
<u>113 - PERSI Durable Power of Attorney</u>	
<u>115 - Beneficiary Designation and/or Member Name Change</u>	<u>115 Instructions</u>
<u>322 - Federal and Idaho State Tax Withholding Selection</u> <u>322 - Submit on-line</u>	

<u>448 - Direct Deposit Authorization</u>	
<u>451 - Release of Information</u>	
<u>451 - Submit on-line</u>	

Annual Reports:

[You can view the Fiscal Year Annual Reports by clicking here.](#)