



United States Department of State

*Bureau of Human Resources
Office of Retirement
Room H-620, SA-1
Washington, D.C. 20522*

INFORMATION TO APPLY FOR FOREIGN SERVICE SPOUSAL ANNUITY BENEFITS

In order to apply for Foreign Service survivor benefits, please submit the following completed documents to the Department of State, Office of Retirement, HR/RET, Room H620, SA-1, 2401 E Street, NW, Washington, DC. 20522-0108. The Office of Retirement will make a determination on eligibility for entitlements and calculate any applicable survivor annuity.

- Form DS-5022, Application of Death Benefits.
- A certified copy of the Death Certificate.
- Form SF-1199A, Direct Deposit Form which may be obtained from any bank, in order to have the survivor annuity checks sent to your bank via electronic funds transfer. You will be responsible for notifying our Retirement Accounts Division (RM/GFSC/GC/APRO/RAD), Department of State, 1969 Dyess Avenue, Building 646B, Charleston SC, 29415, of any future annuity check address changes. A new SF-1199A will need to be submitted to change your bank check address.
- Form W-4P, Federal Tax Withholding. The Survivor annuity is subject to Federal income tax. Unless you complete the enclosed form Federal Income Tax, will be automatically withheld from the annuity on the basis of being married with three exemptions. Please read all the information contained on the instruction sheet with the form.
- Form DS-5014, State Tax Withholding Request. If you wish to have state income taxes withheld from your survivor annuity, please complete the enclosed form. Since the tax liability varies with each state, you may wish to check with your tax advisor or the tax authority for your state prior to completing this form.

The FEHB brochure, RI 79-2 provides survivor information on the Federal Employees Health Benefits Program (FEHB). If you have been covered as a family member under the deceased health plan and you have entitlements to a survivor annuity, the health coverage will be transferred to your name and self-only coverage. If there are minor children, the coverage will remain as self and family. The applicable health premium will be deducted from the survivor annuity.

The FEGLI brochure, RI 76-12 provides survivor information on the Federal Employee Group Life Insurance (FEGLI). If the decease was covered by FEGLI, we will notify the Office of Personnel Management (OPM), administrators of the program. They will provide the necessary claim forms/information to the designated beneficiary (ies).

If the designated beneficiary(ies) do(es) not receive the claim application form within six to eight weeks, OPM should be contacted directly at the following address:

ATTN: CSI/LI Roll Maintenance
Office of Personnel Management
Employee Service and Records Center
PO Box 45
Boyers, PA 16017

The beneficiary's letter must reference the deceased FEGLI identification number, CSI _____. (Request CSI number via e-mail to: Rnet@state.gov)

The FSRDS & FSPS Survivor Information (Changes in Status) provides information to report future changes in address, health benefits enrollment, and marital status.

Please download the following documents from <http://www.rnet.state.gov/>

DS-5022, Application for Death Benefits
DS-5014, State Tax Withholding Request
W-4P, Federal Tax Form
RI-79-2, FEHB Brochure
RI 76-12, FEGLI Brochure
DS-5006, Designation of Correspondence and Payment Address
FSRDS & FSPS Survivor Information (Changes in Status)
SF-1199A, Direct Deposit

Office of Retirement
HR/RET
Department of State
2401 E Street, NW
Room H620, SA-1
Washington, DC 20522-0108

Telephone number: (202) 261-8960
Fax number: (202) 261-8988

NOTE: IT IS HIGHLY RECOMMENDED THAT YOU MAKE A COPY OF THE SIGNED, COMPLETED PAPERWORK PRIOR TO MAILING IT AND RETAIN IT FOR YOUR FILES.