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 Toll-free: 1.888.773.7748
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 Fax: 717.772.3860
 PSRS- 1332 (01/2024)

Executor Request for PSERS Documents



Mail Center

The Public School Employees' Retirement System (PSERS) can provide a copy of certain documents relating to a deceased payee (e.g., a *Form 1099-R*) to an appointed executor, administrator, or personal representative of the payee's estate. To request copies of documents, please complete and return this form to PSERS. If there are multiple individuals named as an executor, administrator, or representative of the estate, then all named individuals must sign this form.

A copy of the document evidencing your authority to request documents (e.g., a Short Certificate or Letters of Administration) must be submitted with this request.* *Note: If requesting a 1099-R, please do not submit to our office prior to February for the preceding tax year.*

*If you have any questions regarding opening an estate, please contact an attorney or your local courthouse. PSERS cannot provide you with legal advice.

Deceased Member Information

Deceased Member Name:

Deceased Member SSN or PSERS ID:

Executor Information

Executor Name(s):

Daytime Telephone:

Email:

Mailing Address

Document(s) Requested

- Form 1099-R (specify year(s) needed) _____
- Other (please specify) _____

Certification

I certify that all the information above is true and correct. I understand that any falsification of the information provided may subject me to criminal liability under 18 Pa.C.S. § 4904 (Unsworn Falsification to Authorities).

Executor Signature(s):

Date Signed: