Washington State Investment Board Total Allocation Portfolio (WSIB TAP)
**Annuity Estimate**

The variables used to create this estimate were provided by you. This is an estimate and calculations may vary at the time of retirement. Final terms will be provided in a policy when the annuity is purchased; you will have 15 days to rescind the purchase after the final calculation is made.

Current Date: November 1, 2026

## Personal Information

| | | | |
|---|---|---|---|
| Annuitant's Name | | Annuitant's Birth Date | |
| Joint Annuitant's Name | | Joint Annuitant's Birth Date | |

## WSIB TAP Annuity Information

| | |
|---|---|
| Purchase Price | |
| Payment Begin Date | |

## Annuity Options

For comparative purposes, the following Annuity Options are also available. Payments are based on the information you provided above.

| | **Beginning Monthly Payment** |
|---|---|
| Option 1 (Single Life Annuity): | |
| Option 2 (Joint Life 100% Survivorship): | |
| Option 3 (Joint Life 50% Survivorship): | |
| Option 4 (Joint Life 66-2/3% Survivorship): | |

## Projected Monthly Payments — 3% Guaranteed COLA

## How to purchase a Plan 3 annuity

### Step 1

**Make sure there is enough money in the appropriate investment account (WSIB or Self-Directed Investment Program) to cover the purchase price.**

The minimum purchase price for each investment program is $25,000 for a WSIB annuity and $5,000 for the Self-Directed program annuity. You can move funds from one investment program to the other if necessary. It may take up to 70 days to complete the transfer, but you may do this at any time before purchasing your annuity. You do not need to wait until your employment has ended before you transfer funds between investment programs.

### Step 2

To purchase a TAP Annuity online, access your Plan 3 investment account through www.drs.wa.gov/login and select Request Online Withdrawal.

Visit www.drs.wa.gov/annuity to find out more about the TAP Annuity and to see additional DRS annuity options.

For additional questions about the TAP Annuity, contact the DRS record keeper at 888-327-5596.

This calculator is provided for educational purposes only and does not serve as legal, financial or tax advice. You should always consult with your financial planner, attorney and/or tax advisor as needed.

Results and analyses are based on information provided by you and no assumptions are made as to your particular situation. Projections are hypothetical and are not guaranteed. All investments carry a degree of risk and past performance is not a guarantee of future results. Asset allocation and diversification do not ensure a profit and do not protect against loss in declining markets. You should discuss reallocation of funds, potential fees and investment options with your financial advisor.