



San Joaquin County Employees' Retirement Association

6 S. El Dorado Street, Suite 400 Stockton, CA 95202 • (209) 468-2163 • ContactUs@sjcera.org

Membership Certification

Complete and **return this form to your Personnel Office within 3 business days of your start date**. Attach a copy of your birth certificate or valid passport, or present it in person at SJCERA. If you do not have a birth certificate or valid passport, or are unable to obtain one, see the [Age Verification Policy](http://www.sjcera.org) on www.sjcera.org for other acceptable documents.

1. Member Information

First Name	MI	Last Name	Cell Phone
SSN	Date of Birth	Employee ID Number	

2. Previous Employment & Reciprocity *(Previous employment information is needed to determine reciprocity, a benefit that allows members to move from one eligible, government retirement system to another and retain valuable retirement benefits. See instructions on back)*

Most Recent Previous Employer	Retirement System (Refer to list of systems on the back)
Last Date of Employment (under most recent reciprocal retirement system)	First Membership Date (in any previous reciprocal retirement system)

Check applicable statement:	For Payroll Use
<input type="checkbox"/> I have not been an active member of another reciprocal California government retirement system within the last six months. (Active members are generally permanent full-time employees. See list of retirement systems on back.)	Tier 2
<input type="checkbox"/> I retired from _____ retirement system and subsequently began full-time employment with an SJCERA-participating employer.	Tier 2
<input type="checkbox"/> I was a member of the _____ retirement system and, within six months, subsequently began full-time employment with a SJCERA-participating employer.	--
<input type="checkbox"/> My reciprocal system membership began <u>before</u> Jan. 1, 2013 <u>and</u> I left my member contributions on deposit with that retirement system.	Tier 1
<input type="checkbox"/> My reciprocal system membership began <u>on/after</u> Jan. 1, 2013 <u>or</u> I withdrew (refunded) my member contributions from that retirement system	Tier 2

3. Acknowledgement

I hereby certify that the foregoing information is true and correct. I understand that incorrect information may require corrections to my SJCERA account including, but not limited to, my membership date, tier and contribution rate. I authorize SJCERA to establish reciprocity if I am eligible and make any necessary corrections to my account including collecting additional contributions if owed.

EMPLOYEE SIGNATURE	DATE
--------------------	------

4. Employer Certification *(See instruction on back)*

Employing Agency/Department	New Employee's Job Class Title	Employee Hire Date
Employer Designee (signature)	Designee Title	Date

Previous Employment and Reciprocity Information for Completing Section 2

It is important that SJCERA is aware of your prior public plan benefits in order to enroll you in the appropriate retirement Plan and Tier. Reciprocity allows members who move from one eligible, California government retirement system to another within six months, to retain earned retirement and related benefit rights. It gives you portability by allowing you to link your service credit and highest average compensation between all of your reciprocal systems.

Reciprocal California Government Retirement Systems

1. Counties and participating districts that operate under the County Employee's Retirement Law of 1937:

Alameda	Los Angeles	Sacramento	Santa Barbara
Contra Costa	Marin	San Bernardino	Sonoma
Fresno	Mendocino	San Diego	Stanislaus
Imperial	Merced	San Joaquin	Tulare
Kern	Orange	San Mateo	Ventura

2. Other Reciprocal Agencies:

- California Public Employees' Retirement System (CalPERS)
Includes all agencies whose employees are members of CalPERS including state agencies, county schools, various counties, cities, and special districts.
- California State Teachers Retirement System (CalSTRS)
- Legislators' Retirement System (LRS)
- Judges' Retirement System I and II (JRS)

Retirement Benefit Tiers

Tier 1 Members: Employees who entered SJCERA membership before January 1, 2013, or who establish incoming reciprocity based on eligible reciprocal system membership before January 1, 2013.

Tier 2 Members: Employees who enter SJCERA membership on or after January 1, 2013; Tier 1 members who terminate and return to a different SJCERA-participating employer after more than six months; SJCERA retirees who return to active membership.

Employee Instructions

Complete, sign, and date the *Membership Certification* form and return it along with a copy of your birth certificate or other proof-of-age documents to your Personnel Office within 3 business days of beginning employment.

Employer Instructions

1. Collect this Membership Certification Form from all new full-time benefited employees, verify the date of birth is entered correctly and complete the Employer Certification section.
2. Submit the following completed forms and documents directly to SJCERA within the first week of employment:
 - Member Certification
 - Copy of the employee's Birth Certificate, valid U.S. Passport or valid California Real I.D. Card
See the [Age Verification Policy](#) on www.sjcera.org for other acceptable documents.
 - Beneficiary Designation
 - Safety Only – Social Security Form SSA-1945 (if applicable)

For more information about retirement benefits, including reciprocity, visit www.sjcera.org.