



# RETIREMENT APPLICATION REQUEST FORM

San Joaquin County Employees' Retirement Association

Received box - SJCERA Staff use only

**IMPORTANT:** Fully complete and return this form to **SJCERA** at **contactus@sjcera.org** or **220 E. Channel Street, Stockton, CA 95202** to receive a Retirement Application Packet within 60 days of your retirement date. If an incomplete form is returned, a delay in services may occur.

## SECTION 1: MEMBER INFORMATION

Full Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Employee ID/Last 4 SSN: \_\_\_\_\_ Phone: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Estimated Retirement Date (usually date after termination): \_\_\_\_\_

## SECTION 2: SPOUSE/REGISTERED DOMESTIC PARTNER INFORMATION (IF APPLICABLE)

Full Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Date of marriage or registration of domestic partnership: \_\_\_\_\_

## SECTION 3: UNMARRIED/UNREGISTERED, LIST BENEFICIARY (IF ANY)

Full Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Relationship to Member: \_\_\_\_\_

## SECTION 4: CHECKLIST

**Check all that apply** (see pg. 2 for more information).

- ☐ I have enclosed my age 62 Social Security estimate so that SJCERA can include a temporary Social Security Advancement estimate (an increased benefit until age 62, and a decreased benefit thereafter).
- ☐ I have an injury or illness that permanently incapacitates me from performing my job duties and would like information regarding a disability retirement.
- ☐ I have enclosed the Additional Services Credit form so that SJCERA can estimate the cost to purchase service. I understand that payment for all service purchases must be completed prior to retirement.
- ☐ I am a member of a reciprocal retirement system.

Name of Reciprocal Retirement System: \_\_\_\_\_

Dates of service: \_\_\_\_\_ to \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## REQUIRED DOCUMENTS

**The following documents will be required prior to completing your retirement application:** birth certificates for yourself and beneficiary, marriage/registered domestic partnership license and/or dissolution, and picture identification.

## TEMPORARY SOCIAL SECURITY ADVANCEMENT

If you retire before the age of 62 and you are eligible to collect a Social Security (SS) benefit at age 62, please provide SJCERA with an estimate prepared by SS to see the amount available to you for the Temporary Annuity. Visit [www.socialsecurity.gov](http://www.socialsecurity.gov) or call 800.772.1213 to get an estimate. Be sure your SS estimate reflects the benefit you would be eligible to receive at age 62 based on the expectation that you stop working on your retirement date. If you provide an estimate from SS that shows you will work after your retirement date (e.g., until age 62) and you do not continue working until that age, your actual SS benefit will be different than what is shown on your estimate. If you select the Temporary SS Advancement option, your SJCERA retirement benefit is based on the SS estimate provided and will not be adjusted to reflect your actual SS benefit, even if you wait until after age 62 to receive SS.

## DISABILITY RETIREMENT

If you become disabled, physically or mentally, from performing your job duties, you may apply for disability retirement regardless of your age. If you are eligible and the Board of Retirement finds you are permanently disabled, you may receive a disability retirement benefit. There are two types of disability retirement:

1. Service-Connected Disability Retirement (job-related): To be eligible, you must be permanently incapacitated, physically or mentally, from performing your job duties and the incapacity is the result of a job-related injury, illness or disease. There is no age or length of service requirement to be eligible for Service-Connected Disability.
2. Nonservice-Connected Disability Retirement (not job-related): To be eligible, you must be permanently incapacitated, physically or mentally, from performing your job duties due to a permanent injury, illness or disease that is not job related. You must have at least five years of SJCERA retirement service credit or a combination of SJCERA/reciprocal retirement service credit to be eligible for a Nonservice-Connected Disability Retirement.

## SERVICE PURCHASE

You may be eligible to purchase additional service credit for part-time or temporary service prior to membership in SJCERA, unpaid medical leaves of absence, active military service, or other public service. If you believe you are eligible, complete the Service Credit Purchase Request form available on [www.sjcera.org](http://www.sjcera.org). Payment for all service purchases must be completed prior to retirement.

## COMMUNITY PROPERTY AND DOMESTIC RELATIONS ORDERS

If you are or were married or in a registered domestic partnership during your SJCERA membership, your (former) spouse/partner has a community property interest in all or a portion of your retirement benefit which cannot be terminated or transferred to another person without your spouse/partner's written consent or a qualified domestic relations order issued by a court of competent jurisdiction. If SJCERA has been joined in a petition for legal separation or dissolution of marriage to which you are a party, initial payment of your retirement allowance will be delayed until SJCERA receives a domestic relations order from the court.

## RECIPROCAL MEMBERSHIP

If you are a member of a reciprocal retirement system, please provide the information requested under Section 4 (Retirement System Name, and Dates of Service). If your reciprocal final average salary is greater than your County of San Joaquin (or other participating employer) monthly final average salary, SJCERA will use the amount from the reciprocal system. Monthly final average salary is based on the highest 26 consecutive pay periods (one year) for Tier 1 members, and the highest 78 consecutive pay periods (three years) for Tier 2 members.