ORANGE COUNTY OCERS EMPLOYEES RETIREMENT SYSTEM

Orange County Employees Retirement System
2223 E. Wellington Avenue. Suite 100
Santa Ana, CA 92701
(714) 558-6200
www.ocers.org

Retirees Authorization for Electronic Deposit of Retirement Checks

To start your direct deposit, please complete the following steps:

1. Mark the box that indicates whether you would like your check deposited into your checking or savings account.
2. Mark the box that indicates if this is a new Authorization Request or a Change in your financial institution or account number.
3. Fill in the effective date, your name, and your financial institution's name and location. Include the Co-Applicant's name if it's a joint account.
4. Attach a voided check or a deposit slip for verification of all financial institution information. If you are unable to attach the requested document, please fill in your account number, and the routing number of the financial institution.
5. Sign below. Keep the yellow copy for your file and return the white copy to OCERS at the address below.
6. Return the completed form to:
   Orange County Employees Retirement System (OCERS)
   2223 Wellington Avenue
   Santa Ana, CA 92701

STAPLE A VOIDED CHECK HERE

I authorize OCERS and the financial institution listed below to deposit my check automatically to my:

☐ Checking Account ☐ Savings Account

each month and, if necessary, to adjust or reverse a deposit for any entry made to my account in error.

This authorization will remain in effect until I have cancelled it in writing.

☐ New Request ☐ Change

Effective Date (Must be the first of the month)

Member Name (Please print)

Financial Institution

Social Security Number

Address

Email Address (optional) Member Phone Number

City State Zip Code

Original Member (if other than above)

Financial Institution Account Number

Social Security Number

Financial Institution Routing number

Co-Applicant's Name if Joint Account

Financial Institution Phone Number

Signature Date

NOTE: Be sure you have signed the form!