



P: 714.558.6200 | website: ocers.org

Submit this form to:
OCERS
PO Box 1229
Santa Ana, CA 92702
(714) 558-6200

Member Contribution Refund Election Form - Alameda

This form is to be used if you are an OCERS member affected by the Alameda Decision who will be issued a refund of member contributions and interest. OCERS will issue your refund based on the information you provide below. **This form must be completed and returned by September 1, 2022.**

1. Member Information

Last Name	First Name	M.I.	Social Security Number
Home/Mailing Address			
City	State	Zip Code	
Phone Number	Email Address		

2. Options for Refund of Contribution

Choose only one option. If no selection is made, you will receive a refund by check.

<input type="checkbox"/> Option 1 – Taxable Refund by Check Federal Withholding: 20% federal income tax will be withheld from your refund. State Withholding: Please withhold 2% California Tax <input type="checkbox"/> Yes <input type="checkbox"/> No If no election is made and you reside in the State of California, we will automatically withhold 2% for California state income taxes.
<input type="checkbox"/> Option 2 – Rollover Rollover to the qualified retirement account that I have designated below. (If you selected this method, complete Section 3) Note: Federal and state tax withholdings do not apply to direct rollovers.

