



Need Assistance?

The OCERS team is here to help. If you need guidance with reporting a death or updating a beneficiary, please contact us:

- Phone: (714) 558-6200
- Member Services Directory:
ocers.org/member-services-directory
- Survivor Benefits Information:
ocers.org/survivor
- Beneficiary Changes:
ocers.org/beneficiary-changes

Contact Us



2223 E. Wellington Ave.
Suite 100
Santa Ana, CA 92701



714-558-6200



Monday-Thursday 8am-5pm
Friday 8am-4:30pm



www.ocers.org



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SURVIVOR BENEFITS

*A Guide to Reporting a Death of
an OCERS Member, Survivor,
or Beneficiary*



Providing superior pension service since 1945

Four Things to Keep in Mind When Reporting the Death of an OCERS Member, Survivor, or Beneficiary

When an OCERS member, survivor, or beneficiary passes away, please notify OCERS promptly so we can provide guidance and process any benefit adjustments.

Below are four key factors to keep in mind:

1 Report Promptly

Report a death to OCERS as soon as possible. Reporting promptly helps OCERS update records accurately and ensure that any benefits due to survivors are processed as quickly as possible.

Ways to report a death:

- **Phone:** (714) 558-6200
- **Mail:** Orange County Employees Retirement System (OCERS)
P.O. Box 1229
Santa Ana, CA 92702
- **In Person:** 2223 E. Wellington Ave.,
Suite 100
Santa Ana, CA 92701
- **Online:**
www.ocers.org/upon-death

4 Keep Beneficiaries Current

Update your beneficiaries after major life events (marriage, divorce, child birth/adoption, or death of a named beneficiary). Updates can be made anytime through myOCERS:
<https://mss.ocers.org/>

2 Commonly Requested Documents

After your call, OCERS may request:

- Certified death certificate
- Marriage certificate or domestic partnership registration certificate
- Birth certificates or passports
- Birth certificates or adoption paperwork for eligible children
- Divorce decree or termination of domestic partnership documents
- Social Security Number (SSN) or Tax ID Number for beneficiaries, estate, or trust
- Photo identification for beneficiaries



3 Payable Benefits to Designated Beneficiary Depend on Several Factors

Benefits payable to the beneficiary will vary based on the member's employment or retirement status at the time of death.

- **Active Members:** Years of service, marital status, final average salary, employment contract, job classification, and eligibility of designated beneficiary
- **Retired Members:** Member's chosen retirement payment option, marital status, eligibility of designated beneficiary

Because of these factors, OCERS cannot determine what benefits are payable until all required documentation is received and reviewed. Lump-sum death benefits are typically issued within 60 days of all paperwork being submitted.