



P: 714.558.6200 | website: ocers.org

Submit this form to:
Mail: PO Box 1229
Santa Ana, CA 92702

Request To Defer Retirement

Please print or type

1. Member Information

First Name	M.I.	Last Name	
Previous Last Name(s)			Last Four of Social Security Number
Home/Mailing Address	City	State	Zip Code
Formert Employer/Department		Daytime Phone Number	

2. Defer Retirement

Please handle my OCERS account in the following manner: (check one)

You may defer retirement and receive future benefits if you leave your contributions on deposit with OCERS. In order to qualify for a service retirement, you must be at least age 50 and have the equivalent to 10 years of retirement service credit. You can change your mind and request a withdrawal of your contributions at any time.

a. I am eligible for retirement benefits from OCERS and elect to leave my contributions in my OCERS account. **I understand that I must notify OCERS when I wish to begin receiving retirement benefits.**

In order to establish reciprocity between OCERS and your new retirement system, you must leave your contributions and interest on deposit. You must also start your employment under your new system within 180 days of termination from OCERS. **If you choose this option, you cannot withdraw your funds from OCERS while you are a member of the new system.** Refer to your Summary Plan Description for additional information on reciprocity.

b. I am a member of a reciprocal system and elect to leave my contributions on deposit with OCERS. I understand that these funds cannot be withdrawn while I am a member of the new system.

New Retirement System : _____

Member signature

Date

3. For OCERS Use Only

Date Employment Terminated/Status Changed: _____

Certified By

Date

Title