



Orange County Employees  
Retirement System  
P.O. Box 1229  
Santa Ana, CA 92702  
(714) 558-6200  
[www.ocers.org](http://www.ocers.org)

# Retirement Plan Election City of SJC Member Affidavit

## Choosing Your Retirement Benefit Formula

All eligible new employees are required to elect their retirement benefit formula. You have 30 days from your hire date to make a one-time election of your retirement benefit formula. Once you have made your election, your choice of benefit formula is **irrevocable**. If you fail to make an election within 30 days of your hire date you will be deemed to have irrevocably elected Plan W (1.62% at 65) and the applicable employee and any additional contributions for that plan will be deducted from your paycheck and deposited to your OCERS member account. *Please note that employee contributions for either of the plans are mandatory and will be applied retroactively and deducted from your paycheck as either a single payment or multiple payments in a pay period after you have submitted your Retirement Plan Election - Member Affidavit form.*

For more information on your OCERS retirement benefits visit OCERS' website at [www.OCERS.org](http://www.OCERS.org) or by calling us at (714) 558-6200.

## Instructions for Naming Your Beneficiary

1. You may name one person or any number of persons as your primary or alternate beneficiary.
  - a. **Primary Beneficiary:** A primary beneficiary is the person or persons who would receive a benefit from OCERS upon your death.
  - b. **Alternate Beneficiary:** An alternate beneficiary is the person or persons who would receive a benefit from OCERS if you have no living primary beneficiaries on the date of your death.
  - c. If you name more than one person in either category, you must indicate what percentage of the benefit each individual is to receive. If you do not indicate a percentage, the benefit will be divided into equal parts.
2. Your designated beneficiary will be valid until the date you file another Beneficiary Change Form. Please note that, under California state law, if you have at least five years of service with OCERS at the time of your death, your spouse or dependent children have legal rights to any death benefits payable regardless of the beneficiaries designated on this affidavit (or the beneficiaries designated on any future Beneficiary Change Form you may file).



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Please print or type

## 1. Member Information

First Name		M.I.	Last Name		Social Security Number
Home/Mailing Address					Home Phone Number
City			State	Zip Code	Work Phone Number
Birth Date	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced		If Married - Date of Marriage	

## 2. Retirement Plan Election

Plan U (2.5% at 67)

Plan W (1.62% at 65)

## 3. Beneficiary Designation

Please indicate the name of the individual(s) you wish to name as your Primary and Alternate beneficiary(ies). For complete instructions on designating beneficiaries, see the instruction sheet of this affidavit.

### Primary beneficiary designation(s) - (percent of Benefit must total 100%)

1)	Beneficiary Name	Social Security Number	Relationship	Date of Birth	% of Benefit
	Home/Mailing Address				
	City			State	Zip Code
2)	Beneficiary Name	Social Security Number	Relationship	Date of Birth	% of Benefit
	Home/Mailing Address				
	City			State	Zip Code

### Alternate beneficiary designation(s) - (percent of Benefit must total 100%)

1)	Beneficiary Name	Social Security Number	Relationship	Date of Birth	% of Benefit
	Home/Mailing Address				
	City			State	Zip Code
2)	Beneficiary Name	Social Security Number	Relationship	Date of Birth	% of Benefit
	Home/Mailing Address				
	City			State	Zip Code

## 4. Previous California Public Service

Are you a prior OCERS member? No , Yes . If yes, complete below:

Former OCERS employer: \_\_\_\_\_ OCERS status: Deferred (funds are on deposit)   
Terminated (funds were withdrawn)  Retired (receiving a monthly pension)

Are you a member of any other public retirement system in CA? No , Yes . If yes, complete below:

Name of other system: \_\_\_\_\_ Status: Deferred (funds on deposit)   
Terminated (funds were withdrawn)  Retired (receiving a monthly pension)

## 5. Member Certification

I hereby affirm that the statements I have made on this Member Affidavit are true and correct to the best of my knowledge and belief. I further affirm and understand that any election made on this form is irrevocable and if I decline to make a retirement plan election I will be irrevocably placed in the W (1.62% at 65) plan.

Member Signature	Phone Number	Date
Witness Signature	Phone Number	Date

## 6. To Be Completed By SJC Personnel

Date Entered Continuous Service		Present Employer		
Payroll Title	Agency	Title Code	Payroll Range	Salary

## For OCERS Office Use Only

Entered by: _____	Date: _____
Reviewed by: _____	Date: _____