



Strength. Service. Commitment.

SAN DIEGO COUNTY EMPLOYEES RETIREMENT ASSOCIATION

REQUEST FOR SERVICE RETIREMENT APPLICATION OR BENEFIT ESTIMATE AMOUNT

Please complete and return this form to SDCERA at the address below. You will receive an application and/or estimate of your retirement benefit via U.S. mail in approximately six to eight weeks. Note: This is NOT an application for retirement; it is a request for either an application or an estimate based on the selection you make. You may select more than one box:

- Please provide a service retirement benefit estimate but not a full application packet
Please provide a service retirement application packet and benefit estimate
Please provide a disability benefit estimate but not a full application packet
Please provide a disability retirement application packet and benefit estimate

MEMBER INFORMATION

Form with fields: Full name, Social Security number, Street address, Birth date (mo/day/year), City, State and Zip, Daytime telephone number, Department, Estimated retirement date (mo/day/year) (usually the day after your termination date)

SPOUSE'S/REGISTERED DOMESTIC PARTNER INFORMATION (if applicable)

Form with fields: Full name, Social Security No., Marriage/registration of domestic partnership date, Birth date (mo/day/year)

FINAL COMPENSATION Final average monthly compensation is the highest 26 consecutive pay periods (one year) salary covered for retirement purposes and will be determined using the highest 26 consecutive pay periods preceding your retirement/separation.

If you are a member of a reciprocal retirement system, please provide the information below. If your reciprocal final average monthly compensation is greater than your County of San Diego final average monthly compensation, SDCERA will use the final compensation from the reciprocal retirement system to calculate your estimate. Please check one:

- I am not a reciprocal member of another retirement system (skip the remainder of this section)
I am a reciprocal member of another retirement system as follows:

Form with fields: Name of reciprocal retirement system, Highest average monthly salary from your reciprocal agency. This amount will be verified when your final benefit is calculated. \$, Dates of service from (mo/day/year) to (mo/day/year):

TEMPORARY SUPPLEMENT (Applies to service retirement applications/ estimates only.) If you are a General member, the SDCERA benefit estimate you receive will include an amount SDCERA has estimated your Social Security (SS) benefit to be at age 62. The SS estimate is necessary to provide the Temporary Supplement option on your SDCERA estimate. As an alternative to using SDCERA's estimate of your SS benefit, you may provide an estimate prepared by SS (contact Social Security at 1.800.772.1213). The estimate you obtain from SS should reflect the benefit you would be eligible to receive at age 62 based on the expectation that you stop working on your retirement date. If you provide an estimate from SS that shows you will work after your retirement date (e.g. up until age 62) and you do not work until age 62, your actual SS benefit will be different than what is shown on your estimate.

Safety Members must provide SDCERA with an estimate prepared by the Social Security Administration as discussed above to receive an estimate that includes the Temporary Supplement option.

Signature _____ Date _____