

MEMBERSHIP ELECTION



Sonoma County Employees' Retirement Association
433 Aviation Boulevard, Suite 100, Santa Rosa, CA 95403
Tel: (707) 565-8100 / Fax: (707) 565-8102
www.scretire.org

MEMBER NAME: _____ **SSN:** _____

Member to elect one of the following per the provisions on page 2:

- Deferred status with reciprocity:** Having terminated employment with a SCERA-covered employer, I hereby elect to leave my contributions on deposit with SCERA and I will become a member of the _____ retirement system within six months of my termination.

- Deferred Non-Vested status:** Having fewer than five years of retirement service credit, and having terminated employment with a SCERA-covered employer, I hereby elect deferred non-vested status and thereby leave my contributions on deposit with SCERA.

- Deferred Vested status:** Having five or more years of retirement service credit, and having terminated employment with a SCERA-covered employer, I hereby elect deferred vested status and thereby leave my contributions on deposit with SCERA.

Member Signature

Date Signed

Address*

City*

State*

Zip*

Email

Phone No.

*If this information differs from what SCERA has on file, your signature on this form authorizes SCERA to update our records with this address.

The following provisions apply for each status listed.

Reciprocity

- Reciprocity is not automatic. It must be requested from the system you are leaving.
- You must become a member of another reciprocal California public retirement system within six months of termination from a SCERA-covered employer.
- **You must retire on the same date from all reciprocal systems.**
- Your funds must remain on deposit with SCERA and **cannot be withdrawn** unless or until you terminate membership with the reciprocal system and withdraw your funds from that system.
- Accumulated SCERA contributions continue to earn interest semi-annually.
- You are considered Deferred Vested with SCERA upon reciprocity being granted regardless of years of services or status in the reciprocal retirement system.

Deferred Non-Vested

- You have fewer than five years of retirement service credit.
- If your contributions remain on deposit until you reach age 70, you will be eligible to apply for a service retirement and begin receiving a lifetime monthly benefit.
- If you have a total of ten years of combined service credit in reciprocal California public retirement systems, but are not eligible for reciprocity, you may be eligible for a service retirement prior to age 70. Please contact SCERA for further information.
- An election to allow contributions to remain on deposit may be revoked by the member at any time, prior to retirement, if you meet the ***Withdrawal / Rollover Employment Requirements*** below.
- Accumulated SCERA contributions continue to earn interest semi-annually.

Withdrawal / Rollover Employment Requirements

An election to withdraw/rollover your contributions is not allowed for Deferred Non-Vested members if you are:

- employed in any capacity with a SCERA-covered agency; or
- an employed member of a California state funded retirement system; or
- an employed member of a reciprocal system who is eligible to develop reciprocity.

Deferred Vested

- You must have a minimum of five years of retirement service credit.
- You may apply for service retirement upon reaching the date you would have been eligible to retire had you remained a SCERA member in a full-time position.
- An election to allow contributions to remain on deposit may be revoked by the member at any time, prior to retirement.
- Accumulated SCERA contributions continue to earn interest semi-annually.