

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.

You may email your completed/signed form to SCERA.MemberServices@sonoma-county.org.

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- Your funds must remain on deposit with SCERA and **cannot be withdrawn** unless or until you terminate membership with the reciprocal system and withdraw your funds from that system.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.
- Accumulated SCERA contributions continue to earn interest semi-annually.
- 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.

Deferred Vested Withdrawal / Rollover Employment Requirements

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

- employed in any capacity with a SCERA-covered agency unless you meet the following age requirements based on your SCERA membership:
 - General – Age 58 or older
 - Safety – Age 50 or older