

PENSION PLAN ELIGIBILITY/RETIREMENT QUESTIONNAIRE

Completion of this form assists the employer in determining current membership or new members. It is the employee's responsibility to provide complete and accurate information. Failure to provide accurate information may result in you being placed in the wrong Tier, which affects future retirement benefits.

PLEASE CHECK ALL THAT APPLY:

A. California State Teachers' Retirement System (CalSTRS):

Have you ever been a CalSTRS member? If yes, please answer; otherwise skip to **Section B**.

_____ I am a member of the State Teachers Retirement System (CalSTRS).

Date of membership: _____ Last day of service: _____

_____ I am a *retired* member of the State Teachers Retirement System (CalSTRS).

Date of retirement: _____

Have you refunded from State Teachers Retirement System? Yes _____ No _____

B. California Public Employees' Retirement System (CalPERS):

Have you ever been a CalPERS member? If yes, please answer; otherwise skip to **Section C**.

_____ I am a member of the Public Employees Retirement System (CalPERS).

Date of membership: _____ Last day of service: _____

Was your PERS membership based on public school employment? Yes _____ No _____

_____ I am a *retired* member of the Public Employees Retirement System (CalPERS).

Date of retirement: _____

Have you refunded from Public Employees Retirement System? Yes _____ No _____

C. Other Retirement/Pension Plans:

Have you ever worked for one of the public agencies listed on the reverse side of this form?

Yes _____ No _____ If yes, please indicate name of agency and dates of employment:

Name of Public Agency	Dates of Employment
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Are you continuing to work for any other districts? Yes _____ No _____

***If none of the above apply, please *initial* the applicable acknowledgement**

____ Certified non-members—I have received the CalSTRS permissive election information.

____ Classified non-members — I have received the "exclusion from CalPERS membership" information.

Print Name	Social Security Number
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Signature	Date
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Verified for *first payroll period (if verifiable)* by _____ on _____ Date _____

Public Retirement Systems with Reciprocity

County Systems — Counties that maintain retirement systems under the County Employees' Retirement Law of 1937:

Alameda	Mendocino	San Mateo
Contra Costa	Merced	Santa Barbara
Fresno	Orange	Sonoma
Imperial	Sacramento	Stanislaus
Kern	San Bernardino	Tulare
Los Angeles	San Diego	Ventura
Marin	San Joaquin	

Independent Public Agency Retirement Systems -- Public agencies maintaining their own retirement systems that have contracted with CalPERS to provide the benefits of reciprocity and the dates the reciprocal agreements were established:

*City of Concord (11/27/70)	*City & County of San Francisco (7/29/88)
*City of Costa Mesa (safety employees only) (4/1/78)	City of San Jose (misc. 12/9/94; safety 9/30/94)
City of Fresno (misc. & safety retirement systems) (2/18/02)	Contra Costa Water District (3/2/88)
City of Oakland (non-safety employees only) . (4/1/71)	County of San Luis Obispo (4/19/84)
City of Pasadena (fire and police retirement) (5/4/01)	East Bay Municipal Utility District (4/16/84)
*City of Sacramento (11/4/74)	East Bay Regional Park District (safety employees only) (7/1/96)
*City of San Clemente (non-safety employees only) (1/1/85)	Los Angeles County Metropolitan Transportation Authority (Non-Contract Employees' Retirement Income Plan, formerly Southern California Rapid Transit District (5/12/71)
City of San Diego (6/25/92)	City of Los Angeles

**These entities are now CalPERS-covered employers. If you earned service credit in these systems prior to their CalPERS contract, you may be eligible for reciprocity for that earlier service credit.*

No formal reciprocity, but similar benefits extended — **California State Teachers' Retirement System (CalSTRS)**, Judges' Retirement System (JRS), Judges' Retirement System II (ORS II), Legislators' Retirement System (LRS), The University of California Retirement Plan (UCRP) (10/1/63)