

# CalPERS Retirement Check List

## Miscellaneous

Name: \_\_\_\_\_

Date of Hire: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Job Title: \_\_\_\_\_

**Please read the options below and check the box that best describes your situation (please only check one box):**

1. I was first hired by the *County of Santa Cruz* before December 17, 2012 in a budgeted (non extra-help) position.  
Dates previously worked for *County of Santa Cruz*: \_\_\_\_\_ to \_\_\_\_\_  
Position previously held with *County of Santa Cruz*: \_\_\_\_\_
- 2a. I was first hired by the *County of Santa Cruz* between December 17, 2012 and December 31, 2012.
- 2b. I was first hired by the *County of Santa Cruz* on/after January 1, 2013, but worked **within the past six months** for \_\_\_\_\_, another employer in CalPERS retirement system or the \_\_\_\_\_ retirement system, which has reciprocity with CalPERS.  
Dates worked for last California public employer: \_\_\_\_\_ to \_\_\_\_\_
3. I was first hired by the *County of Santa Cruz* on/after January 1, 2013 and have *not* worked for another employer in CalPERS or a reciprocal retirement system within the past six months.
4. Other. Describe: \_\_\_\_\_

**I certify that the above information is true and correct.**

Signature \_\_\_\_\_

Date \_\_\_\_\_

**\*DISCLAIMER: CALPERS, NOT THE COUNTY, MAKES THE FINAL DETERMINATION AS TO RETIREMENT TIER AND FORMULA.**

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### THIS SECTION FOR COUNTY USE ONLY:

- 2% @ 55, FAE 1, Early Retirement Age 50, MBF 2.418% @ 63
- 2% @ 60, FAE 3, Early Retirement Age 50, MBF 2.418% @ 63
- 2% @ 62, FAE 3, Early Retirement Age 52, MBF 2.5% @ 67

Verification steps: \_\_\_\_\_

CalPERS Original Membership Date: \_\_\_\_\_

Staff Initials: \_\_\_\_\_ Date: \_\_\_\_\_