



# Retirement Allowance Estimate Request

888 CalPERS (or 888-225-7377) • TTY: (877) 249-7442

This is not an application for retirement. This is a request for an estimate of potential future retirement benefit amounts. You are limited to two CalPERS-generated estimate requests in a 12-month period and must be within one year of retirement. See the back of this form for detailed instructions.

## Section 1

Provide the address you would like your estimated retirement allowance sent to.

### Information About You

Name of Member (First Name, Middle Initial, Last Name) \_\_\_\_\_ Social Security Number or CalPERS ID \_\_\_\_\_

Birth Date (mm/dd/yyyy) \_\_\_\_\_ ( ) Daytime Phone \_\_\_\_\_ ( ) Evening Phone \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

## Section 2

Not all CalPERS members are eligible for industrial disability retirement. Contact your personnel office for eligibility information.

### Retirement Information

Type of estimate  Service  Disability  Industrial Disability \_\_\_\_\_ Projected Retirement Date (mm/dd/yyyy) \_\_\_\_\_

Employer \_\_\_\_\_ Position Title \_\_\_\_\_

Sick Leave Hours \_\_\_\_\_ Educational Leave Hours \_\_\_\_\_

Are you a member of another retirement system that has established reciprocity with CalPERS?  No  Yes

Name of System \_\_\_\_\_ Estimate Final Compensation Amount \_\_\_\_\_

If your membership date is January 1, 2002, or later, the amount of your Temporary Annuity cannot exceed the estimated amount of your Social Security benefit at the age designated in this election.

### Temporary Annuity – Available for service retirement only.

If you first became a member on January 1, 2002, or later, and you have CalPERS service coordinated with Social Security, you elect to receive Temporary Annuity until age \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ per month. (62 to 70)  
Dollars

..... or .....

If you first became a member prior to January 1, 2002, you elect to receive Temporary Annuity until age \_\_\_\_\_ in the amount of \$ \_\_\_\_\_ per month. (59½ or whole age 60 to 68)  
Dollars

## Section 3

### Individual Lifetime Beneficiary (2, 2W, 3, 3W, 2W/1 and 3W/1)

Name of Beneficiary \_\_\_\_\_ Relationship to You \_\_\_\_\_ Birth Date (mm/dd/yyyy) \_\_\_\_\_

## Section 4

### Information About Your Survivor Continuance

Do you have an eligible survivor?  No  Yes

## Section 5

CalPERS will provide an estimate for standard Options 1, 2, 2W, 3, 3W, 2W/1 and 3W/1, and Unmodified Allowance. If these do not meet your needs, you may request one of the approved Option 4 types listed at right.

### Your Option 4 Retirement Options

Specific Percentage to Beneficiary \_\_\_\_\_ %  Specific Dollar Amount to Beneficiary \$ \_\_\_\_\_  
Percentage Amount

Reduced Allowance for Fixed Period of Time:  
Reduce my Allowance by \_\_\_\_\_ through the end of \_\_\_\_\_  
Percentage or Dollar Amount Date (mm/yyyy)

Reduced Allowance Upon Death of Member or Beneficiary \$ \_\_\_\_\_  
Reduction Amount

Multiple Lifetime Beneficiaries:  
\_\_\_\_\_ \_\_\_\_\_  
Birth Date (mm/dd/yyyy) Dollar/Percent of Benefit Birth Date (mm/dd/yyyy) Dollar/Percent of Benefit

Mail to:

CalPERS Benefit Services Division • P.O. Box 942717, Sacramento, California 94229-2717

## Section 1

### Information About You

**Name:** Provide your first name, middle initial, and last name.

**CalPERS ID or Social Security Number:** Provide your CalPERS ID or Social Security Number.

**Birth Date:** Provide month, day, and complete year.

**Mailing Address:** Provide the mailing address where you want to receive your estimated retirement allowance.

**Telephone Number(s):** Provide us your home and/or work number in case we need to reach you.

## Section 2

### Information About Your Retirement Estimate

**Projected Retirement Date:** List your projected retirement date. The minimum retirement age for service retirement for most CalPERS members is age 50 with five years of CalPERS service credit. State members under the Second Tier retirement plan must be 55 years old with 10 years of service credit. There are some exceptions to these requirements.

**Type of Estimate for Retirement Allowance:** Select the type of retirement estimate you wish to receive. Not all CalPERS members are eligible for an industrial disability retirement. Please contact your personnel office for information on eligibility.

**Sick Leave/Educational Leave:** List any sick leave or educational leave you would like to have included in your retirement estimate calculation. Any leave included in your request must be reported by your employer at the time of retirement and may result in a different benefit if amounts differ.

**Other California Public Retirement Systems:** Reciprocity is an agreement CalPERS has with many California public retirement systems that allows movement among public employers within a specified time limit, without losing valuable retirement and related benefit rights. For additional information please refer to the *When You Change Retirement Systems* publication.

**Temporary Annuity** is an additional monthly income you may choose to temporarily enhance your pension from CalPERS. If you take a disability retirement, a Temporary Annuity is not available. The benefit is payable from your retirement date to a specific age that you select. It is important to note that this benefit is not free. Your CalPERS monthly lifetime retirement allowance is reduced to pay for your Temporary Annuity. For additional information, please refer to the *Temporary Annuity* publication.

## Section 3

### Individual Lifetime Beneficiary (2, 2W, 3, 3W, 2W/1 and 3W/1)

A **beneficiary** is any person(s) you designate to receive a benefit after your death. If you would like to provide a lifetime monthly benefit to a beneficiary, we need their date of birth.

**Relationship to You:** A beneficiary can be a spouse, child, friend, etc.

**Beneficiary Birth Date:** Provide month, day, and complete year.

## Section 4

### Information About Your Survivor Continuance

Survivor Continuance is an employer-paid benefit payable to an eligible survivor upon your death. An eligible survivor is a spouse married to you or a domestic partner legally recognized in California as your domestic partner on and at least one year prior to your tentative retirement date and continuously until your death (for Disability or Industrial Disability Retirement, these conditions must be met on or before the effective date of your disability or industrial disability retirement); or an unmarried child under age 18 or disabled; or an economically dependent parent.

## Section 5

### Your Retirement Options

CalPERS will provide you an estimate for the standard options (1, 2, 2W, 3, 3W, 2W/1 and 3W/1). If none of these meets your needs, you may request **one** of the Option 4 allowances, as long as the amount to your beneficiary(ies) is not more than the benefit provided under Option 2W. For additional information please refer to the *Retirement Option 4* publication. If you want multiple lifetime beneficiaries to receive an equal share of your monthly benefits, do not specify a dollar or percentage of benefit.