



# Know about your benefits... when life events occur.

CalPERS Member Education Catalog



As you go through life there are certain events that can impact your CalPERS benefits.



Whether you are new to CalPERS, in the middle of your career or nearing retirement, this booklet lists the training opportunities or educational resources to help you through these events as they apply to your life and your career. To help with this process, we have identified seven key life event categories:

- My Career** ..... 3
  - Welcome to CalPERS ..... 4
  - Employment Changes ..... 5
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- My Life** ..... 7
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  - Preparing for Retirement ..... 10
  - Death ..... 11

Each category includes several individual life events that are aligned with instructor-led or online classes, educational videos, forms and publications.

# Where you can find information

From our CalPERS website at [www.calpers.ca.gov](http://www.calpers.ca.gov) you'll find the educational resources and publications relevant to the different stages of your career and life.

Our home page is broken down into three categories:



## I Want To...

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Here you'll find a link to our education opportunities, including a list of our instructor-led and online classes, upcoming webinars and videos. Select the **I Want To... Attend Training & Events** link, then under the **Education Center** select the **Member Education** link.



## Life Events:

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You'll find information to help you with these events as they apply to your life and your career.



## Forms & Publications:

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Access the CalPERS forms and publications that you can view or download online.

*The following pages will provide the available resources focused on life events.*



## My Career

As you navigate through the various phases of your career, you'll experience changes along the way. With these changes you'll have questions about your benefits, how to manage your career or what you need to know as you approach retirement. These educational resources will help answer your questions and guide you through your career events.

# Welcome to CalPERS

If you are new to CalPERS, the following educational resources will be a helpful starting point to learn more about your benefits.



## Member Education

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### **Instructor-Led or Online Class**

New CalPERS Member

### **Videos**

CalPERS Members: Early Career Basics

CalPERS Health Benefits for Public Agency and School Members

Health Benefits for State Members



## Forms & Publications

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Local Miscellaneous Member Benefit Publication (PUB 8)

Local Safety Member Benefit Publication (PUB 9)

School Member Benefit Publication (PUB 2)

State Miscellaneous & Industrial Member Benefit  
Publication (PUB 6)

State Safety Member Benefit Publication (PUB 7)

Health Program Guide (HBD 120)

Power of Attorney (PUB 30)

# Employment Changes

If you have experienced an employment change, educational resources are listed below.



## Life Events

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- Leave of absence
- Leaving CalPERS Membership
- Returning to Work



## Member Education

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### Instructor-Led or Online Class

- Continuing CalPERS Member

### Videos

- CalPERS Members: Early Career Basics
- CalPERS Health Benefits for Public Agency and School Members
- Health Benefits for State Members
- Service Credit Purchases



## Forms & Publications

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- A Guide to Your CalPERS Service Credit Purchase Options (PUB 12)
- Refund/Rollover Election Package
- When You Change Retirement Systems (PUB 16)
- Health Program Guide (HBD 120)

# Illness/Injury/Disability

Because not all life events are reasons to celebrate, we want you to find the information you need to get through what may be a challenging time.



## Life Events

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- Disability
- Injury
- Terminal Illness



## Forms & Publications

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- A Guide to Completing Your CalPERS Disability Retirement Election (PUB 35)
- Power of Attorney (PUB 30)
- Health Program Guide (HBD 120)



## My Life

Changes will occur in your personal life that will impact you and your family. These life changes can come in many forms – marriage, moving to a new home, birth or adoption of a child, divorce, or planning for your retirement. CalPERS has educational resources to help answer your questions and guide you through your life events.

# Family Changes

With life comes change, which may mean adjustments to your member benefits information.



## Life Events

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- Birth or Adoption
- Domestic Partnership
- Marriage or Divorce



## Member Education

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### Instructor-Led or Online Class

Continuing CalPERS Member

### Videos

- CalPERS Members: Early Career Basics
- CalPERS Health Benefits for Public Agency and School Members
- Health Benefits for State Members



## Forms & Publications

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- A Guide to CalPERS Community Property (PUB 38A)
- CalPERS Model Domestic Relations Orders (PUB 38B)
- Changing Your Beneficiary or Monthly Benefit After Retirement (PUB 98)
- Beneficiary Designation
- Health Program Guide (HBD 120)

# Personal Information Changes

It's important you have up-to-date contact information (name, mailing address, email and/or telephone number) on file with us. It's the only way we can ensure important CalPERS correspondence reaches you in a timely manner.



## Life Events

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- Name Change
- Address Change



## Member Education

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### Instructor-Led or Online Classes

- Continuing CalPERS Member
- Planning Your Retirement
- Completing Your Retirement Application
- Retired CalPERS Member

### Videos

- CalPERS Members: Early Career Basics
- CalPERS Health Benefits for Public Agency and School Members
- Health Benefits for State Members
- Health Benefits into Retirement
- Planning Your Retirement
- Your Retirement Options and Online Application



## Forms & Publications

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- Address Change Authorization
- Tax Withholding Election (Retirees and Beneficiaries)
- Health Program Guide (HBD 120)

*See page 2 in this booklet to help you find the educational resources listed on these pages.*

# Preparing for Retirement

If you're within a few years of retirement, planning is important. Helpful resources are noted below.



## Life Events

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Retirement



## Member Education

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### Instructor-Led or Online Classes

Planning Your Retirement

Completing Your Retirement Application

### Videos

Benefit Basics

Planning Your Retirement

Your Retirement Options and Online Application

Health Benefits into Retirement



## Forms & Publications

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Planning Your Service Retirement (PUB 1)

Power of Attorney (PUB 30)

A Guide to Completing Your Service Retirement Election (PUB 43)

A Guide to Completing Your CalPERS Disability Retirement Election (PUB 35)

A Guide to Completing Your Nonmember Service Retirement Election Application (PUB 44)

Partial Service Retirement (PUB 14)

Retirement Option 4 (PUB 18)

Temporary Annuity (PUB 13)

Health Program Guide (HBD 120)

Employment After Retirement (PUB 33)

Reinstatement from Retirement (PUB 37)

# Death

To notify CalPERS of a death, call our toll free number **888 CalPERS** (or **888-225-7377**), write to us or visit the CalPERS Regional Office nearest you. The resources below provide information regarding the death of a member, family member or a beneficiary.



## Life Events

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Death



## Member Education

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### Instructor-Led or Online Classes

Continuing CalPERS Member  
Planning Your Retirement  
Retired CalPERS Member

### Videos

CalPERS Members: Early Career Basics  
Planning Your Retirement



## Forms & Publications

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Local Miscellaneous Member Benefit Publication (PUB 8)  
Local Safety Member Benefit Publication (PUB 9)  
School Member Benefit Publication (PUB 2)  
State Miscellaneous & Industrial Member Benefit Publication (PUB 6)  
State Safety Member Benefit Publication (PUB 7)  
Health Program Guide (HBD 120)  
Changing Your Beneficiary or Monthly Benefit After Retirement (PUB 98)  
Retired Member Death Benefits (PUB 31)

*See page 2 in this booklet to help you find the educational resources listed on these pages.*

## Member Education Bulletin

Subscribe to our Member Education Bulletin to learn when our webinars, instructor-led classes, and CalPERS Benefits Education Events will be held.

Visit the CalPERS website at **[www.calpers.ca.gov](http://www.calpers.ca.gov)**, scroll down to Subscribe where you can sign up for the Member Education Bulletin along with other CalPERS Newsletters and Alerts.

We look forward to helping  
you find what you want to know!



