



California Public Employees' Retirement System
Employer Management Account Division

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ELECTION OF OPTIONAL MEMBERSHIP - STATE APPOINTEE

The California Public Employees' Retirement Law (PERL) provides "optional" membership rights for certain public officers and employees. Those eligible optional members are excluded from membership until a written election for membership is filed with the California Public Employees' Retirement System (CalPERS).

Government (Gov.) Code section 20320 states a person directly appointed by the Governor, without the nomination of any officer or board, or an officer or an employee directly appointed by the Attorney General, Lieutenant Governor, Controller, Secretary of State, Treasurer, or Superintendent of Public Instruction is exempt from civil service under Article VII of the California Constitution, except those appointed pursuant to subdivision (i) of section 4 thereof, is excluded from membership in CalPERS unless they file an election in writing with the Board of Administration to become a member.

Gov. Code section 20321 states that persons appointed to the office of the Adjutant General or Assistant Adjutant General after October 1, 1961, shall have rights to membership with CalPERS and shall have no rights under the retirement benefit provisions of the Military and Veterans Code, except that persons entitled to retirement benefits under the Military and Veterans Code appointed to the office of the Adjutant General or Assistant Adjutant General shall continue to receive military retirement benefits during their term of office.

State appointees subject to this section should consider the following:

- You may elect CalPERS membership at any time while you are a compensated appointee holding the appointed office, as long as the office is not otherwise excluded by law.
- Your membership may be terminated only upon permanent separation from employment covered by CalPERS and subsequent withdrawal of retirement contributions.
- While being a CalPERS member, you may request costing information to purchase any previous eligible service in your appointed position at any time prior to retirement.
- The form ***Request for Service Credit Cost Information – Layoff, Prior Service, and Optional Member Service*** (PERS-MSD-372) (PDF) to request costing information for optional member service is available on our website.
- If your election for optional membership in CalPERS will result in concurrent service with employment credited in a private benefit plan or another public retirement system, please contact that organization for information regarding the impact of such concurrent service.

- If your election will result in concurrent employment under CalPERS, please contact the Employer Account Management Division before completing this election form.

Please note: Board/commission/committee positions “with nomination” are not eligible for optional membership but qualify under standard membership eligibility under Gov. Code section 20305. Refer to the PERL and the State Reference Guide for further information on state appointees. Any questions on membership eligibility may be directed to the Membership Services.

We are here to assist you. If you have any questions, visit our website at www.calpers.ca.gov, or call us toll free at **888 CalPERS** (or **888-225-7377**).

Employer Account Management Division

Complete and return this form to your Human Resources Office to establish membership with CalPERS.

I am an **Appointed Officer** as defined in Gov. Code section 20320 or 20321, being the
(officer/position title) _____ of the
(state agency) _____.

I was first appointed on _____.

My present term will expire on _____.

Agency contact name _____.

Agency telephone _____.

In accordance with the provisions of Gov. Code sections 20320 or 20321, **I elect to become a member of CalPERS.** I request this election be filed with the CalPERS Board of Administration as my election to become a member.

I understand this election is **irrevocable** as long as I remain in this position.

Print Full Name

Signature

Date

CalPERS ID or Social Security Number

Daytime Telephone Number

Address, City, State Zip

Your enrollment eligibility date is determined based upon the provisions set forth by law.

- If we receive the completed election within 90 days from the date you became eligible for membership for the term/appointment, this eligibility date will be used as your CalPERS enrollment date.
- If we receive the completed election after 90 days from the date you became eligible for membership for the term/appointment, your enrollment eligibility date will be the first day of the month the election was received by CalPERS.