

Revision Date: November 2015 – State Reference Guide

Chapter: Benefits Procedures
Section: Beneficiary Designation Form
Pages: 80

Legend: ~~Deleted/Replaced~~ – Added/Revised

The purpose of the [Beneficiary Designation Form](#), (myCalPERS 0772), is to:

1. Provide a means for a member who is not retirement eligible and who is not eligible for the Alternate Death Benefit (**first tier members** under age 50 with 20 or more years of service, **second tier members under age 55 with 20 or more years of service, members under PEPRA age 52 with 20 or more years of service**) to designate beneficiaries other than the statutory beneficiaries provided by the retirement law. The statutory beneficiaries are listed under Section 4; item C of the myCalPERS 0772.

SPECIAL INSTRUCTIONS

1. Changes on the form are ~~acceptable only when they are clear and initialed by the member.~~ **not acceptable unless specified on the instructions page.**
 2. Complete the **Beneficiary Designation Form**, make a copy for your records, and then mail to CalPERS at the address provided on the form.
 3. After CalPERS reviews the form, a confirmation letter will be mailed to the member generally within ~~approximately 8~~ **4** weeks. If the form is not acceptable, a new form will be mailed to the member.
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Chapter: Benefits Procedures
Section: Death of an Active Member
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PART II – PAYROLL/CONTRIBUTION INFORMATION

1. Dates of pay periods (monthly, semi-monthly, bi-weekly, or quadri-weekly) ~~for the month of separation and each of the four pay periods prior to the last day on pay status.~~ **for the four pay periods prior to the last day on pay status.**
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Chapter: Benefits Procedures

Section: Retirement General

Pages: 87

Legend: ~~Deleted/Replaced~~ – Added/Revised

Request for Estimates or Counseling

1. Members may receive immediate estimates by using the CalPERS website Retirement Estimate Calculators, available on the CalPERS website, www.calpers.ca.gov. Using the online Retirement Estimate Calculator allows members the flexibility to calculate an estimate using their own anticipated assumptions or projections. ~~anticipated by or known to the member,~~ If a member logs into their my|CalPERS account, the estimate calculator will project service credit based on the anticipated retirement date using the latest payroll data we have on record, allowing them to determine the best retirement date based on these anticipated changes or projections. This is also the recommended service for members seeking retirement estimates greater than one year in the future. Please note that CalPERS-generated estimates do not project future salary increases, changes in time base, or unreported special compensation. We recommend members use these retirement estimate calculators when seeking retirement estimates with a retirement date more than one year in the future.
2. CalPERS generated retirement estimates are processed by the Benefit Services Division. These estimates use the payroll reported by the employer and do not project future salary increases, changes in time base, or unreported special compensation. Please note, actual final compensation may be different after payroll reconciliation and review, and will be based on compensation allowable by law. Members who are within one year of their expected retirement date may request a CalPERS generated Retirement Estimate if they download, complete, and mail the [Retirement Allowance Estimate Request](#) form to CalPERS at the address located at the bottom of the form. Members within one year of retirement may request two CalPERS generated estimate requests in a 12-month period. Alternatively, a request form can be mailed to you by calling CalPERS at **888 CalPERS** (or **888-225-7377**).

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Chapter: Benefits Procedures

Section: Employment of a Retiree

Pages: 102 - 109

Legend: ~~Deleted/Replaced~~ – Added/Revised

Note: The entire *Employment of a Retiree* section was re-written and re-organized.
