

Nonmember Retirement Allowance Estimate Request

Section 1

Enter the address we have on file for you. If you need to update your address, see the back of this form for instructions.

Information About You

| | | | |
|---|---------------|--------------------------------------|--|
| Your Name (First Name, Middle Initial, Last Name) | | Social Security Number or CalPERS ID | |
| Birth Date (mm/dd/yyyy) | Daytime Phone | Alternate Phone | |
| Address | | | |
| City | State | ZIP | |

Section 2

See the back of this form for details and a complete description of the available retirement and beneficiary payment options.

Estimate Information

My projected retirement date is: _____
Date Required (mm/dd/yyyy)

How many beneficiaries do you want to include in your estimate?

- ☐ None
- ☐ One (Complete the information in the space provided below.)

| | | |
|---------------------|---------------------|-------------------------|
| Name of Beneficiary | Relationship to You | Birth Date (mm/dd/yyyy) |
|---------------------|---------------------|-------------------------|

- ☐ One or more and with a specific dollar or specific percentage amount to each beneficiary.
(Complete the information in the spaces provided below.)

| | | | |
|-------------------------|------------------------------|-------------------------|------------------------------|
| Birth Date (mm/dd/yyyy) | Dollar or Percent of Benefit | Birth Date (mm/dd/yyyy) | Dollar or Percent of Benefit |
| Birth Date (mm/dd/yyyy) | Dollar or Percent of Benefit | Birth Date (mm/dd/yyyy) | Dollar or Percent of Benefit |

Section 3

CalPERS Member Information

Complete all fields. We need this information to ensure your benefit is calculated correctly.

| | |
|--|---|
| Member's Name (First Name, Middle Initial, Last Name) | Member's Social Security Number or CalPERS ID |
| Date of Your Marriage or Domestic Partnership (mm/dd/yyyy) | |

What's the "effective date"?
See the back of this form for details.

Check the box that applies to you and enter the effective date.

- ☐ Dissolution of Marriage _____
Effective Date (mm/dd/yyyy)
- ☐ Legal Separation _____
Effective Date (mm/dd/yyyy)
- ☐ Termination of Domestic Partnership _____
Effective Date (mm/dd/yyyy)

Mail to:

CalPERS Retirement Benefit Services Division • P.O. Box 942711, Sacramento, California 94229-2711

Section 1

Information About You

- Complete all sections with your personal information.
- You can update your address at my.calpers.ca.gov or call us toll free at **888 CalPERS** (or 888-225-7377).

Section 2

Estimate Information

Projected Retirement Date - Your retirement date cannot be earlier than the day following the court-filed date of the court order dividing the community property. If it has been more than nine months from the court-filed date, the date you enter cannot be earlier than the first day of the month you submit this form. Both you and your former spouse or former domestic partner must meet the minimum CalPERS service retirement age requirement as of your retirement date. Your former spouse or domestic partner must have also met the minimum service credit requirement as of your final dissolution of marriage or termination of domestic partnership date. For more information about the age and service credit requirements, go to our website at www.calpers.ca.gov.

Retirement Options - When you retire, you will choose one of the following retirement options and name a beneficiary.

- **Unmodified Allowance** - Provides the highest monthly allowance paid for life. There is no continuing monthly benefit to a beneficiary and no return of unused member contributions upon your death.
- **Return of Remaining Contributions Option 1** - Provides a lump-sum payout of any remaining member contributions in your account to one or more beneficiaries upon your death.
- **100 Percent Beneficiary Option 2** - Provides 100% of the option portion of your ongoing monthly benefit to your named beneficiary upon your death. Upon both your deaths a lump-sum payout of any remaining member contributions in your account will be paid to one or more named secondary beneficiaries.
- **100 Percent Beneficiary Option 2 with Benefit Allowance Increase** - Provides 100% of the option portion of your monthly benefit to your named beneficiary upon your death. If your beneficiary dies before you, or if you have another qualifying event, your benefit will increase to the Unmodified Allowance.
- **50 Percent Beneficiary Option 3** - Provides 50% of the option portion of your ongoing monthly benefit to your named beneficiary upon your death. Upon both your deaths, a lump-sum payout of any remaining member contributions in your account will be paid to one or more named secondary beneficiaries.
- **50 Percent Beneficiary Option 3 with Benefit Allowance Increase** - Provides 50% of the option portion of your ongoing monthly benefit to your named beneficiary upon your death. If your beneficiary dies before you, or you have another qualifying event, your benefit will increase to the Unmodified Allowance.
- **Flexible Beneficiary Option 4** - Provides an ongoing monthly benefit of a specific percentage or specific dollar amount of your retirement benefit to one or more named beneficiaries upon your death.

Section 3

CalPERS Member Information

- Enter the name and Social Security number or CalPERS ID of the member whose account was split in the community property settlement, if known.
- Enter your marriage or registration of domestic partnership date to the member.

What is the "effective date"?

- **Dissolution of Marriage** - The date you returned to single status. This date is normally found on the Notice of Entry of Judgment. It is not the date of separation that was used to divide the CalPERS benefits.
- **Legal Separation** - The date is found on the Judgment of Legal Separation.
- **Termination of Domestic Partnership** - The date is found in the Notice of Termination of Domestic Partnership form.