

## Reciprocity Request Form



**Address:** 100 Marine Parkway | Suite 125  
Redwood City, CA 94065  
**Phone:** (650) 599-1234  
**Toll-Free:** (800) 339-0761  
**Fax:** (650) 591-1488  
**PONY:** RET 141  
**Web:** [www.samcera.org](http://www.samcera.org)  
**Email:** [samcera@samcera.org](mailto:samcera@samcera.org)

Even if you've notified SamCERA about your prior public employment, this form must be submitted to SamCERA to officially request that reciprocity be established. In addition, you must submit a reciprocity form to the other retirement system. Contact them for further information.

**What is reciprocity?** Reciprocity allows you to move among public retirement systems and maintain earned retirement benefits. There are important points to consider before electing reciprocity, so read SamCERA's "**Reciprocity Guide**" and this form carefully before submitting it to SamCERA.

**Eligibility to establish reciprocity:** You may be eligible if you: (1) were a member of a California public reciprocal retirement system; (2) establish membership with SamCERA within six months of leaving that prior retirement system; (3) do not have overlapping service; and (4) left your funds on deposit (or redeposited your funds) with that prior retirement system.

**Sample reciprocal systems include:** CalPERS (California Public Employees' Retirement System), CERL Counties (County Employees Retirement Law), and other public agencies' systems which have reciprocity contracts with CalPERS such as San Francisco Employees' Retirement System and Federated City Employees Retirement System (City of San Jose). Other systems, such as CalSTRS (State Teachers' Retirement System), have differing levels of reciprocity with SamCERA due to the nature of their plans. A list of reciprocal systems can be found in SamCERA's "**Reciprocity Guide**." *Contact SamCERA to verify if a retirement system not listed is reciprocal with SamCERA.*

- **Plan 7 Members:** If you became a member of your prior reciprocal system before January 1, 2013, and SamCERA determines that you are eligible for reciprocity, you will be placed in Plan 5 or Plan 6, which have higher contributions but provide a higher pension benefit. In connection with this change, you may, but are not required to, elect reciprocity. *Contact SamCERA before submitting this form.*

### Benefits of reciprocity:

- Service credit earned under each system may be used to meet each system's vesting and retirement eligibility requirements. However, the service credit does *not* transfer from one system to another and service credit years are *not* combined for purposes of calculating your benefits in each system.
- Your highest pensionable compensation earned in any reciprocal agency will be used by all reciprocal systems to determine your "final compensation" subject to each reciprocal system's rules governing the applicable measuring periods and which pay items are considered pensionable.
- Your SamCERA contribution rate will be based on your age of entry when you became a member in the first reciprocal retirement system. (This does not apply to Plan 7 members.)

### If reciprocity is established, it's important to remember:

- **You must** leave your contributions and interest on deposit with the reciprocal system while you are an active member of SamCERA, and you must retire on the same date from all reciprocal systems.
- Failure to do both of the above may increase your employee contribution rate, you may owe retroactive increased contributions and interest to SamCERA, you will not be able to use your reciprocal systems service credit for retirement eligibility, and you will not be able to use the highest pensionable compensation for each system.
- It might not be advantageous for you to apply for disability retirement. Sometimes the amount you would receive with a service retirement benefit exceeds the amount you would receive with a disability retirement benefit. Also, with certain disability retirement benefits you may only be entitled to an annuity based on your contributions from your prior system.

**Reciprocity Request Form (continued)**

**Member Information**

|   |               |                |
|---|---------------|----------------|
| Last Name                               | First Name    | Middle Initial |
| Last 4 Digits of Social Security Number | Employee ID # |                |

**Qualifying Reciprocal Membership Information**

I worked for the following California public agency, am a member of its retirement system, established membership with SamCERA within six months of leaving that system, and left my funds on deposit (or redeposited my funds) with that retirement system.

|                       |  |   |                             |
|-----------------------|--|---|-----------------------------|
| Name of Public Agency | Last Date of Employment<br>With that Public Agency | My funds are on deposit with the<br>Agency's retirement system. |                             |
|                       |  | <input type="checkbox"/> Yes                                    | <input type="checkbox"/> No |

**Certification & Signature**

**I acknowledge and understand the following:**

**I have reviewed SamCERA's member booklet, "Guide to Your SamCERA Benefits" and SamCERA's "Reciprocity Guide,"** which generally describes the rights and responsibilities of reciprocity. I understand that I may request additional information from SamCERA about reciprocity. I understand that I am not obligated to establish reciprocity, even if I am eligible to do so.

**Upon completing and signing this form, my decision to establish reciprocity is final and irrevocable.**

I understand that once I have elected reciprocity, I cannot revoke my decision, and I cannot withdraw my funds from either SamCERA or my reciprocal retirement system.

|   |      |
|---|------|
| Signature ( <i>print this form and sign</i> ) | Date |
|---|------|

**Return this form to SamCERA:**

San Mateo County Employees' Retirement Association  
100 Marine Parkway, Suite 125  
Redwood City, CA 94065