

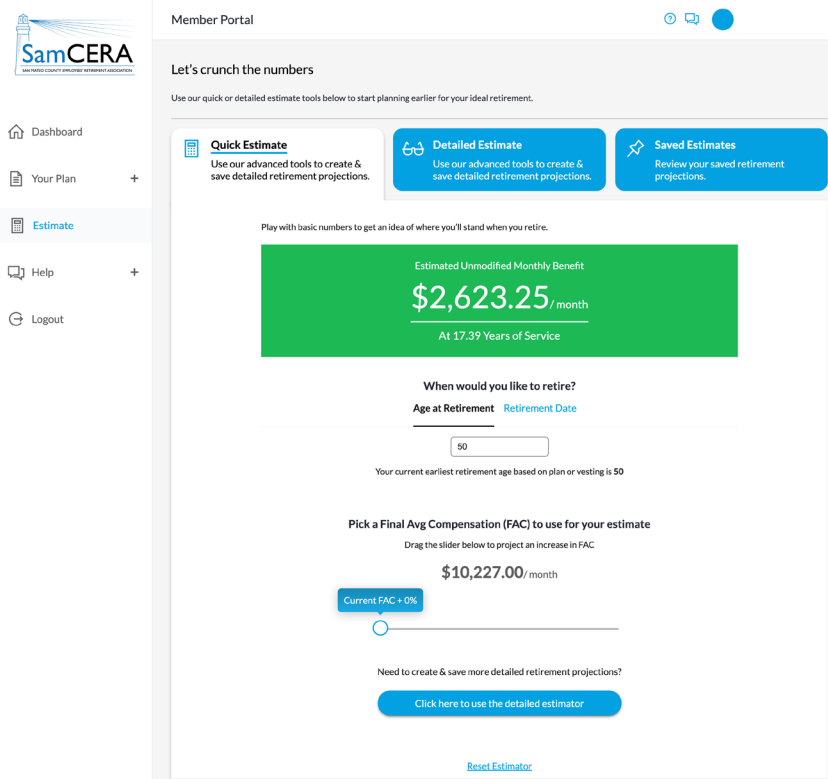
MySamCERA Member Portal: How to Run a Retirement Estimate

Knowing how much you might receive for your monthly retirement benefit can help you decide when it's the right time to retire. MySamCERA makes it easy to get a retirement estimate with the Quick Estimate tool and the Detailed Estimate calculator. Follow the instructions below to run a retirement estimate on MySamCERA.

Quick Estimate

1. After logging in to MySamCERA, click on the Estimate button on the left navigation menu
2. The estimator will default to the Quick Estimate tab. On this screen:
 - Enter your age at retirement or select a retirement date
 - (optional) Use the slider to change your final average compensation (FAC)

Based on this information the Quick Estimator will automatically calculate your estimated monthly retirement benefit in the green box at the top of the screen.



The screenshot shows the MySamCERA Member Portal interface. On the left is a navigation menu with options: Dashboard, Your Plan, Estimate (highlighted), Help, and Logout. The main content area is titled "Member Portal" and "Let's crunch the numbers". It features three tabs: "Quick Estimate" (selected), "Detailed Estimate", and "Saved Estimates". Below the tabs, a green box displays the "Estimated Unmodified Monthly Benefit" of \$2,623.25/month at 17.39 years of service. Below this, there are input fields for "When would you like to retire?" with "Age at Retirement" set to 50 and "Retirement Date" selected. A section for "Pick a Final Avg Compensation (FAC)" shows a current value of \$10,227.00/month and a slider for "Current FAC + 0%". At the bottom, there is a button "Click here to use the detailed estimator" and a "Reset Estimator" link.

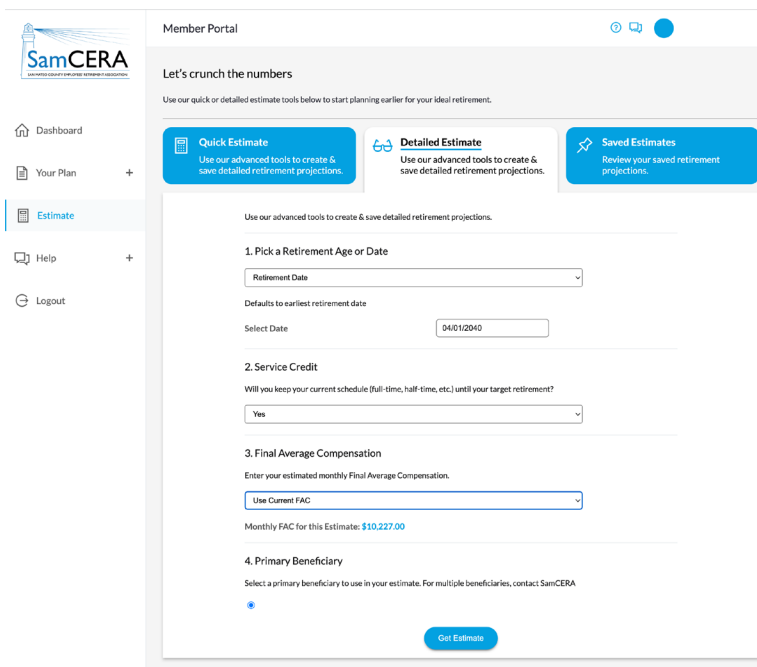
Go to the Detailed Estimate tab to change other variables in your retirement estimate, to see the retirement benefit amount for different retirement options, to save the estimate on your MySamCERA account, and to obtain a PDF file of your estimate that can be saved or printed.

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Detailed Estimate

1. After logging in to MySamCERA, click on the Estimate button on the left navigation menu
2. Select the Detailed Estimate tab
3. On the Detailed Estimate screen:
 - Pick a retirement age or date
 - For Service Credit, select the schedule you anticipate having until your target retirement date
 - Enter your estimated Final Average Compensation
 - Select your Primary Beneficiary (this may default to one person automatically)
4. Click on the Get Estimate button
5. The next screen will display different retirement options available and give you the option to view a PDF of your retirement estimate



Member Portal

Let's crunch the numbers
Use our quick or detailed estimate tools below to start planning earlier for your ideal retirement.

Quick Estimate
Use our advanced tools to create & save detailed retirement projections.

Detailed Estimate
Use our advanced tools to create & save detailed retirement projections.

Saved Estimates
Review your saved retirement projections.

Use our advanced tools to create & save detailed retirement projections.

1. Pick a Retirement Age or Date

Retirement Date

Defaults to earliest retirement date
Select Date

2. Service Credit

Will you keep your current schedule (full-time, half-time, etc.) until your target retirement?

3. Final Average Compensation

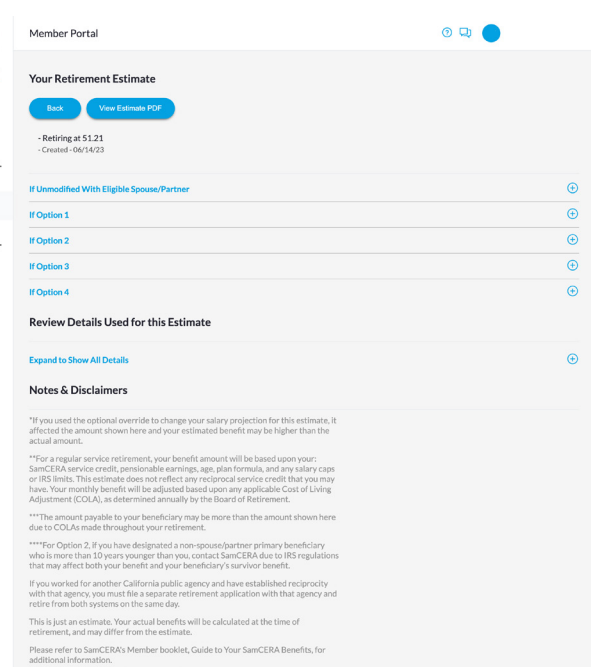
Enter your estimated monthly Final Average Compensation.
Use Current FAC

Monthly FAC for this Estimate: \$10,227.00

4. Primary Beneficiary

Select a primary beneficiary to use in your estimate. For multiple beneficiaries, contact SamCERA

Get Estimate



Member Portal

Your Retirement Estimate

[Back](#) [View Estimate PDF](#)

- Retiring at \$1.21
- Created - 06/14/23

If Unmodified With Eligible Spouse/Partner

If Option 1

If Option 2

If Option 3

If Option 4

Review Details Used for this Estimate

[Expand to Show All Details](#)

Notes & Disclaimers

**If you used the optional override to change your salary projection for this estimate, it affected the amount shown here and your estimated benefit may be higher than the actual amount.

***For a regular service retirement, your benefit amount will be based upon your: SamCERA service credit, pensionable earnings, age, plan formula, and any salary caps or IRS limits. This estimate does not reflect any retroactive service credit that you may have. Your monthly benefit will be adjusted based upon any applicable Cost of Living Adjustment (COLA), as determined annually by the Board of Retirement.

****The amount payable to your beneficiary may be more than the amount shown here due to COLAs made throughout your retirement.

*****For Option 2, if you have designated a non-spouse/partner primary beneficiary who is more than 10 years younger than you, contact SamCERA due to IRS regulations that may affect both your benefit and your beneficiary's survivor benefit.

If you worked for another California public agency and have established reciprocity with that agency, you must file a separate retirement application with that agency and retire from both systems on the same day.

This is just an estimate. Your actual benefits will be calculated at the time of retirement, and may differ from the estimate.

Please refer to SamCERA's Member booklet, Guide to Your SamCERA Benefits, for additional information.

**Need help or have questions?
Email samcera@samcera.org or call 800-339-0761 for assistance.**