

CITY OF SAN JOSE RETIREMENT APPLICATION CHECKLIST




<p>1. <u>Complete the Retirement Application</u> noting the following items:</p> <ul style="list-style-type: none"> • ORS requests that information and documentation be submitted 2-3 months prior to your retirement date. This will allow timely processing of your retirement application. • If married, application must have <u>spouse's signature</u>. • <u>Electronic Signatures Will Not Be Accepted</u> • Your retirement effective date can be any date that you are eligible to retire. It is highly recommended that you retire the last day of the pay period to avoid potential time posting errors that can cause delays in payment or other unforeseeable discrepancies. Also note that the retirement effective date cannot be <i>prior</i> to the date the application is received by Retirement Services. • Important Note Regarding Retirement Effective Date and Insurance Premiums: As an active employee, your insurance premiums are deducted from your 1st and 2nd paychecks of each month. If you select a retirement date which will not allow the 2nd insurance premium to be deducted from your active payroll check, you will be billed for the 2nd insurance premium by Human Resources. Premiums for active insurance coverage will NOT be deducted from your retirement pension check. 	
<p>2. <u>Submit copies of birth certificates.</u> Please submit copies of certified birth certificates for you, your spouse/domestic partner, and dependents who will be covered on your health and/or dental plans. NOTE: For this purpose, "certified birth certificate" is defined as the document filed with the County Recorder in the county in which the birth took place.</p>	
<p>3. If you are married, <u>submit a copy of the certified marriage certificate</u> issued by the County in which you were married or <u>Domestic Partnership Certificate and Declaration of Domestic Partnership (notarized)</u>. Ceremonial Certificates are not accepted.</p>	
<p>4. If you divorced while employed, <u>attach a copy of the complete divorce settlement that addresses your retirement and a copy of the Judgment of dissolution.</u></p>	
<p>5. <u>Submit your application to the Office of Retirement Services:</u> <u>MemberDirect:</u> To submit securely, go to www.sjretirement.com & click "Member Portal Login." Login to MemberDirect, click "Message Center" on the left, click "Send a New Message," and attach your document(s) to the message. <u>Mail/Drop Off:</u> 1737 N. 1st St. Suite 600, San José, CA 95112 (M-F, 8:00-5:00pm) <u>Email:</u> retirement.dept@sanjoseca.gov or <u>Fax:</u> (408) 392-6732</p>	
<p>6. After your application is submitted, you will be assigned to a Retirement Analyst, sent a packet of forms, and scheduled for Group Counseling. Group Counseling provides an opportunity to learn about retirement benefits and forms, ask questions, and have your signatures witnessed by Retirement staff. <u>Forms must be completed properly and returned in a timely manner</u> so that your first pension check is issued on time. Please notify your Analyst if you choose not to attend your Group Counseling Session. When your application is received, Retirement Services will notify your department (current City employees only).</p>	

Additional Information for DISABILITY APPLICANTS:

<p>1. If you are applying for a Service-Connected Disability, ORS will request copies of your medical records from Workers' Compensation. If you want to ORS to consider additional medical records that Workers' Compensation may not have, you must provide them.</p>	
<p>2. If you are applying for a Non-Service Connected Disability you must provide <u>all</u> medical reports supporting your disability claim.</p>	

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I, _____, hereby apply for retirement benefits from the City of San José ☐ Federated System or ☐ Police/Fire Plan effective on _____.

The type of Retirement I am applying for is (check one):

- ☐ **SERVICE** ☐ **DISABILITY SERVICE –CONNECTED (ALSO COMPLETE PAGE 3)**
☐ **EARLY SERVICE RETIREMENT** ☐ **DISABILITY NON-SERVICE CONNECTED (ALSO COMPLETE PAGE 3)**
 (THIS OPTION APPLIES TO POLICE AND FIRE ONLY) ☐ **DEFERRED VESTED**

APPLICANT INFORMATION:

HOME ADDRESS:	SOCIAL SECURITY #:	
CITY, STATE ZIP CODE:	EMPLOYEE ID:	
HOME PHONE:	DATE OF BIRTH:	
CELL PHONE:	AGE AT RETIREMENT:	
WORK PHONE:	TOTAL YEARS OF SERVICE:	
HOME EMAIL ADDRESS:	JOB TITLE:	BARGAINING UNT:
DEPARTMENT:	DO NOT LEAVE BLANK. IF NONE THEN CHECK THE BOX, OTHERWISE PROVIDE DATE(S) IF YOU WERE MARRIED OR IN A REGISTERED DOMESTIC PARTNERSHIP DURING YOUR CITY SERVICE THAT RESULTED IN A DIVORCE/DISSOLUTION, LIST DATE(S) OCCURRED: _____ <input type="checkbox"/> NOT APPLICABLE	
SUPERVISOR:		

☐ **SPOUSE** or ☐ **CERTIFIED DOMESTIC PARTNER** or ☐ **NOT MARRIED**


NAME:	DATE OF BIRTH:	AGE:
SOCIAL SECURITY#:	DATE OF MARRIAGE/CERTIFICATION:	

DEPENDENT INFORMATION:

(PLEASE LIST CHILDREN UNDER AGE 26 WHO WILL BE COVERED UNDER YOUR HEALTH INSURANCE(S), IF ELIGIBLE)

NAME	SSN	DATE OF BIRTH	RELATIONSHIP	LEGAL DEPENDENT OF RETIREE?

☐ **Please check this box if you are not claiming reciprocity. If you are claiming reciprocity please complete page 3.**

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FELONY CONVICTION

Have you ever been convicted of a felony?

Yes _____ No _____

If yes, provide:

Date of Conviction: _____

Court: _____

Case No.: _____

Pending Felony Charge:

Are you currently being charged with committing a felony for acts that allegedly occurred during your City employment?

Yes _____ No _____

If yes, provide:

Date of Conviction: _____

Court: _____

Case No.: _____

I DECLARE UNDER PENALTY OF PERJURY UNDER THE LAWS OF THE STATE OF CALIFORNIA THAT THE FOREGOING INFORMATION STATED IN THIS RETIREMENT APPLICATION (FORM RP-2) IS TRUE AND CORRECT.


RETIREE'S SIGNATURE: _____ DATE: _____

SPOUSE/DP SIGNATURE: _____ DATE: _____

For current employees, Retirement Services will inform your department upon application submittal.

FOR OFFICE USE ONLY

ANALYST:		<input type="checkbox"/> SCD PENDING	CHANGE OF STATUS
AGENDA DATE:		BOARD ACTION: <input type="checkbox"/> APPROVED	<input type="checkbox"/> DENIED
AGENDA ITEM #:			

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RECIPROCITY:

COMPLETE THE FOLLOWING IF YOU ARE A MEMBER OF ANOTHER CALIFORNIA PUBLIC RETIREMENT SYSTEM AND YOU HAVE/ARE CLAIMING RECIPROCITY. **NOTE: YOU MUST RETIRE CONCURRENTLY TO QUALIFY FOR RECIPROCAL BENEFITS.**

NAME OF SYSTEM	DATES OF SERVICE CREDITED	DATE OF RETIREMENT AT RECIPROCAL SYSTEM

----- DISABILITY RETIREMENT APPLICANTS ONLY -----

If you are an active employee on leave please indicate your expected date that you will exhaust all paidleave time_____.

Have you been deemed Maximum Medically Improved or Permanent and Stationary by a doctor?
 Yes _____ No _____

CONSENT TO RELEASE INFORMATION

I request that the Retirement Plan make such investigation as it may deem necessary to establish the facts in my case. My personal physician, your Board Medical Advisor, and all other persons having knowledge of pertinent facts are hereby authorized to disclose them to you or to your agents for the purpose of establishing the kind and degree of my disability. If it is related to the medical condition(s) for which the disability retirement application was submitted, I hereby also specifically consent to the release of any and all alcohol, drug abuse, or psychiatric treatment records under the same conditions as outlined above.

In addition, I understand my responsibility to the Retirement Plan in regard to engaging in a gainful occupation and the need to report all income from such occupation until I attain age 55 (Federated Retirement Plan) or until service plus retirement equal 20 years (Police and Fire Retirement Plan).

RETIREE'S SIGNATURE (PLEASE SIGN): _____

RETIREE'S NAME (PLEASE PRINT): _____

IMPORTANT: Please Attach a List of ALL of Your Workers' Comp. Claims. To Get the List, Contact Your Workers' Comp. Representative and Request a List of All of Your Claims. The List Should Include the Dates of Injuries, Workers' Comp. Claim Numbers, and the Body Parts for the Claims.

MY DISABILITY /INJURED BODY PART IS:
<u>EARLIEST</u> INJURY OR SYMPTOMS OCCURRED ON THE FOLLOWING DATES FOR EACH OF THE ABOVE BODY PARTS:

ATTORNEY'S NAME REPRESENTING YOU FOR RETIREMENT*: _____

ATTORNEY ADDRESS: _____

ATTORNEY PHONE NUMBER: _____

* DISABILITY INFORMATIONAL PACKET WILL BE SENT TO APPLICANT, OR TO THE ATTORNEY LISTED ABOVE, IF ANY.