

City of San José – Office of Retirement Services

Retirement Process Guide

Congratulations on your decision to retire from the City of San José!

- The first step in your retirement process is to submit an [Application for Retirement](#) to the Office of Retirement Services (ORS). We recommend submitting an application about 2-3 months prior to your retirement date. More information on how to submit forms is provided below.

Note: Your application must be received by ORS on or before your retirement date and cannot be dated retroactively. For information on the timing of your first retirement check and continuation of insurances, please refer to [Choosing a Retirement Date](#).

- After you submit your [Application for Retirement](#), ORS will kick off the intake process which includes placing your retirement notice on an upcoming Retirement Board Agenda for approval, notifying your department (if you're a current City employee), and preparing a packet of forms based on your retirement benefit eligibility. Once your individual retirement packet is ready, ORS will email you all the necessary forms, assign your Retirement Analyst, and invite you to a Group Counseling Session.

Note: We highly recommend you attend the Group Counseling Session to assist you to properly fill out your forms, answer your questions, and ensure you have the information you need to make timely decisions.

What documentation is needed? To prepare for your upcoming retirement, please gather the following documents so that they're ready to submit once you've been assigned a Retirement Analyst:

- **Certified Birth Certificate(s)** for your spouse/domestic partner and child dependents who are being enrolled in health insurances.
- **Certified Marriage License or Certificate of Domestic Partnership.** Certificates/Licenses must be issued and certified by the appropriate State, County, or Foreign government. Ceremonial Certificates are not accepted.
- If you divorced during your employment with the City, ORS will need a complete copy of your **court-filed divorce settlement**.

How do I submit my forms? Forms may be submitted securely through the ORS MemberDirect portal, by mail, fax or drop-off in person at the ORS office.

MemberDirect: Go to www.sjretirement.com and click "Member Portal Login." After you login, click "Message Center" on the left then click "Send a New Message." You may attach multiple documents and forms to your message.

Office Location: 1737 N. First Street, Suite 600, San José, CA 95112-4505

Office Hours: Monday – Friday, 8:00 a.m. – 5:00 p.m.

ORS Email: retirement.dept@sanjoseca.gov

Fax: (408) 392-6732

Again, congratulations on your decision to retire! We look forward to working with you.