



RETIREMENT SYSTEM INFORMATION

FORM DESCRIPTION

This form identifies new employee retirement system history and provides new employees retirement system election timelines and requirements. Student Employees are not eligible for participation in any retirement system and should not complete this form.

INSTRUCTIONS

Complete items 1 through 4 below **on the first day of employment in the new position** and forward this form to your worksite Personnel Office.

1. PERSONAL INFORMATION:

Title	Last Name	First Name	Middle Name	Suffix
- -				
Social Security No.	Employee Number	Date of Birth (MM/DD/YYYY)		

2. PREVIOUS/CURRENT RETIREMENT SYSTEM HISTORY

Are you currently a member or have you ever been a member of either the California State Teachers' Retirement System (CalSTRS) or the California Public Employees' Retirement System (CalPERS)? *Examples: K-12 school district; state university; state agency; fire/police department, etc.*

No Yes. Complete the required information below.

- A. **Identify Retirement System:** Public Employees' Retirement System (CalPERS)
 State Teacher's Retirement System (CalSTRS)

EMPLOYER	EMPLOYED		STILL WORKING	RETIRED, DRAWING PENSION ¹	CONTRIBUTIONS STATUS	
	FULL-TIME	PART-TIME			WITHDRAWN	REMAIN ON ACCOUNT
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ PERS retired members are limited to 960 hours each fiscal year; STRS retired members are subject to the Earnings Limitation rule. This amount changes each fiscal year. Contact the appropriate retirement system for details.

If necessary, use additional sheets of paper: sign and date the bottom of each additional page.

- B. **CalPERS Members:** When you accept employment in a position covered by CalSTRS, you may elect to remain with CalPERS by **completing and submitting the CalSTRS Retirement System Election form (ES 372) within 60 days of the effective date of employment in the new position.**

3. RETIREMENT SYSTEM INFORMATION

- **Contract Faculty and Administrators:** You are automatically assigned to the CalSTRS Defined Benefit plan. If you are already a CalPERS member and wish to continue coverage under CalPERS please complete the form as specified in Item 1.B. above. Vesting with CalSTRS occurs after five (5) years of service credit as defined by CalSTRS law. You do not contribute to **Social Security**.
- **Adjunct Faculty:** You are automatically defaulted into the CalSTRS Cash Balance Program unless you:
 1. Are already a CalSTRS member in an existing CalSTRS Defined Benefit (DB) Program *or*
 2. Make an election to one of the programs listed below within 60 days of employment *or*
 3. Are a CalPERS member who elects to continue coverage under CalPERS as specified in Item 1.B. above.
 You do not contribute to Social Security unless you elect to do so below. CalSTRS requires employers to obtain written acknowledgement of your decision. Complete and attach the form identified below.

ELECTION OPTION	COMPLETE FORM
<input type="checkbox"/> Social Security (www.ssa.gov)	Employee Notification and Election (CB 533)
<input type="checkbox"/> CalSTRS Defined Benefit (CalSTRS DB) (www.calstrs.com)	Permissive Membership (ES 350)
<input type="checkbox"/> Public Agency Retirement System (PARS) (www.parsinfo.org)	Employee Notification and Election (CB 533)

4. CERTIFICATION

I certify that I have received retirement system information and understand that if I qualify to make a retirement system election, I must submit all required forms to the Retirement Unit, District Office, within 60 days of the effective date of employment in the new position.

Signature

Signature Date