



Securing Your Tomorrows

Mailing Address: PO Box 512218, Los Angeles, CA 90051-0218

Visit LACERS at 202 W. First Street, Los Angeles, CA 90012-4401

www.lacers.org | lacers.services@lacers.org | Mail Stop 175

(800) 779-8328 | TDD (888) 349-3996 | Fax (213) 473-7218

MANAGED SERVICE RETIREMENT APPLICATION

Last Name

First Name

Middle Name

SSN (last 4 digits) and/or Employee ID

Department/Bureau

Classification

Home Address

City

State

Zip Code

Home Phone Number

Work Phone Number

Cellphone Number

Email Address

Marital Status: Married Divorced Single Legally Separated Widowed

Domestic Partnership: LACERS Declaration State Registered

Spouse/Domestic Partner Name: _____ Date of Birth: _____

Have you established reciprocity with LACERS? Yes No

If yes, name of reciprocal agency: _____

For details, please see the LACERS Reciprocity Information Sheet.

1. Have you served in the Military? (Active duty, Reserves, etc.) Yes (From: _____ To: _____) No

2. Will you receive a retirement benefit from Laborers' International Union of North America (LIUNA) or a Hiring Hall Union plan now or in the future? Yes No

If yes, provide the approximate monthly amount \$ _____

RETIREMENT FILING PERIOD

Your application for retirement may be filed with LACERS no less than 30 days prior to your retirement date but no more than 60 days prior to your retirement effective date. **However, please be advised that due to declared City health and/or fiscal emergency, your proposed retirement effective date is not guaranteed. Therefore, please continue to follow your employing department's reporting policy should your proposed retirement effective date pass prior to receiving confirmation from LACERS. Once your actual retirement effective date is scheduled LACERS will notify you.**

Your Requested Retirement Date: _____

WITHDRAWAL PROCEDURE

Your application for retirement may be withdrawn up to, but no later than midnight the day prior to your LACERS assigned retirement effective date. Your signed written notice of withdrawal must be emailed to Lacers.Services@LACERS.org or faxed to the Service Retirement Unit at (213) 473-7218.

MANAGED SERVICE RETIREMENT APPLICATION

Name _____

COLLECTION OF MISSING CONTRIBUTIONS

Please be advised the retirement process includes a thorough review of your mandatory contributions to LACERS. If you are missing contributions, the Controller's Office will be notified and will contact you about possible payments.

OTHER IMPORTANT INFORMATION

1. Your retirement is **IRREVOCABLE** upon your retirement effective date. Failure to submit all required documents will not impact the irrevocability of your retirement effective date but will impact your payroll date.
2. Pursuant to Charter Section 1164, as a retired employee, you are ineligible for re-employment with the City.
3. Please be advised that pursuant to Section 72(t) of the Internal Revenue Code, you may be subject to an excise tax penalty should you have a prearranged re-employment agreement with any agency or department of the City prior to age 60; including re-employment under a permitted exception contained in Charter Section 1164.
4. **YOU WILL NOT RECEIVE SERVICE CREDIT** for any **UNCOMPLETED** agreement to purchase prior government service time, purchase unpaid leaves, purchase any workers' compensation time and/or any ongoing administrative disputes. Your purchases must be completed while you are an Active Member of LACERS prior to your retirement effective date. You cannot complete the purchase after your retirement. All uncompleted purchase agreements will receive a proportional service credit. All service purchases must be paid in full prior to your retirement effective date to receive full service credit.
5. If you have reciprocity with another governmental agency you must retire from both the City and the reciprocal agency on the same day. Please see LACERS Reciprocity Information Sheet for more information.
6. Please review the Required Document sheet. Failure to provide the required documents will delay the processing of your retirement application.
7. **SICK AND VACATION PAYOUTS ARE NOT PAID OR PROCESSED BY LACERS.** If you believe you are eligible for a sick and/or vacation payout, please direct all questions regarding these payouts to your employing department.
8. If you have a pending community property division, administrative proceeding, or other legal matter that may impact your retirement benefits, your retirement allowance is subject to change. LACERS reserves the right to make corrections to your retirement allowance upon receipt of any Court Order, or in the event additional information regarding your service credit, final contributions or compensation are received subsequent to your retirement effective date.
9. **EMPLOYEES SEEKING OR IN THE PROCESS OF AN ADMINISTRATIVE PROCEEDING.** Please be advised that if you are or are planning to seek administrative remedy involving your employment, your retirement may impact that process or proceeding.

DISCLAIMER

In compliance with the declared City health and/or fiscal emergency, LACERS has instituted an estimated retirement allowance benefit set-up protocol. The retirement allowance you receive may require an adjustment in the future. If an adjustment is required, you will receive any additional funds you are entitled to and your retirement allowance will be adjusted accordingly; likewise, LACERS may need to collect funds from you, should you be overpaid, and your retirement allowance will be adjusted accordingly. If you have been underpaid, you will receive your funds as one lump-sum payment; likewise, should LACERS need to collect funds from you, you will have a one-time lump-sum reduction applied to your monthly allowance. Please note the adjustment to your allowance, if required, may not take place for several months, however, you will be notified in writing.

Submission and acceptance of your retirement application is not a confirmation of your eligibility to retire. Your eligibility to retire will be determined upon final review of your City employment records.

SS Number (last 4 digit) or Employee ID

Member Signature

Date

ADA NOTICE

As a covered entity under Title II of the Americans with Disabilities Act, the City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodations to ensure equal access to its programs, services and activities.

FOR OFFICE USE ONLY

Counselor	Assignment Date
Member Proposed Retirement Effective Date	Actual Retirement Effective Date