

The following steps will assist you in understanding your LACERS benefits and prepare for a retirement counseling session at LACERS.

Step 1. Read the LACERS Summary Plan Description

This publication explains LACERS retirement eligibility criteria and benefits. Familiarizing yourself with your benefit options is always a good place to start before making any decisions. You can find this booklet on the LACERS web site under "Publications" or you can request one from LACERS.

Step 2. Visit LACERS Web Site – www.lacers.org

LACERS web site offers tools to assist in your retirement planning, such as retirement allowance and health subsidy calculators, and information about specific benefit options.

Step 3. Attend a Planning For Retirement Seminar – Late Career

One of the easiest and most comprehensive actions to take in preparing for retirement. To schedule your attendance at a Late Career Retirement Seminar, register on-line using www.lacers.org or call (213) 473-7200 or (800) 779-8328 to reserve a space. Two Late Career Retirement Seminars are held monthly at the LACERS Building, one on a Friday morning and one on a Saturday morning.

Step 4. Schedule a Retirement Counseling Session

Call to reserve your appointment date 60-90 days before your Retirement Date. Your retirement counseling session should be 30-60 days before your Retirement Date. Appointments are strongly recommended and are given precedence over walk-ins. If you come in on a walk-in basis for your counseling session, you may need to come back to the LACERS offices more than once to fill out the remainder of your paperwork.

Step 5. Complete Forms

Once you have scheduled your Counseling Session, LACERS will send you the following information and forms to be completed before your appointment:

- Confirmation of appointment and retirement benefits estimate letter
- Member Information Sheet
- Direct Deposit Authorization Form
- W-9 – Request for Taxpayer Identification Number and Certification
- Checklist for new retirees

Step 6. Gather Required Documents for Your Retirement Counseling Session

Required Documents for **EMPLOYEES**:

- Social Security Number – You will be required to complete a Request for Taxpayer Identification Number and Certification (W-9) for verification of Social Security Number
- Copy of Marriage Certificate
- Copy of Birth Certificate
- Names, addresses, phone numbers, and Social Security numbers (optional) of all of your living children and parents regardless of age (if applicable)
- Copies of documents showing termination of any and all prior marriages and domestic partnerships (i.e. Notice of Entry of Judgment, Death Certificate, Termination of Domestic Partnership) or legal separation court documents, if applicable
- Copy of Medicare card (if applicable)
- Copy of State or Federal issued photo identification (i.e. Driver's License)

Required Documents for **SPOUSE/DOMESTIC PARTNER**:

- Social Security Number – Spouse/Domestic Partner will be required to complete a Request for Taxpayer Identification Number and Certification (W-9) for verification of Social Security Number
- Copy of Birth Certificate
- Information about previous marriage(s) and/or Domestic Partnership(s)
- Copy of Spouse's/Domestic Partner's Drivers License or California Identification Card
- Copy of Spouse's/Domestic Partner's Medicare card (if applicable)

Note: An Affidavit of Domestic Partnership must be on file with LACERS for at least one year prior to the effective date of retirement in order for your Domestic Partner to receive eligible survivor benefits

Step 7. Make a List of Questions for Your Retirement Counseling Session

This is your opportunity to speak with a retirement expert. It is recommended that you make a list of questions or issues that you would like to discuss with your retirement counselor. All of your retirement questions should be answered so you feel comfortable with your decisions.

Congratulations! You have taken your first steps towards retirement!

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