

# Enrollment Affidavit

**Purpose of this form:** Use this form to advise CCCERA that you are a new employee or a rehire that might be eligible for CCCERA membership.  
**NOTE:** The original document must be submitted. Fax/Copies are not accepted.

**Additional forms for employee:**

- Complete Beneficiary Designation (Form 102).
- Complete Death During Active Membership (Form 104), if applicable.

Section 1: MEMBER INFORMATION			
First Name	MI	Last Name	Social Security Number
Street or P.O. Box		City	State Zip Code
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth (mm/dd/yyyy)
Phone Number		Email Address	

Section 2: EMPLOYMENT INFORMATION /REQUEST RECIPROCITY (see instructions on Page 2)	
<b>Contribution Information</b> I have contributed to CCCERA before this present employment. <input type="checkbox"/> Yes* <input type="checkbox"/> No	<b>Benefits Information</b> I currently receive a monthly benefit payment from CCCERA. <input type="checkbox"/> Yes* <input type="checkbox"/> No
Were you previously employed by Contra Costa County or a District participating in CCCERA? Were you ever a member of any other Public Retirement System in California? Do you still have retirement funds on deposit with any other Public Retirement System in California? If your funds are still on deposit with another reciprocal retirement system, do you wish to request reciprocity?	<input type="checkbox"/> Yes* <input type="checkbox"/> No <input type="checkbox"/> Yes* <input type="checkbox"/> No <input type="checkbox"/> Yes* <input type="checkbox"/> No <input type="checkbox"/> Yes* <input type="checkbox"/> No
*If your answer is yes to any of the above questions, please provide information on all agencies, dates employed and any other names used.	
<ul style="list-style-type: none"> <li>• I certify that I left my funds on deposit (or redeposited my funds) with that employer's retirement system.</li> <li>• I understand that by accepting employment in a specific retirement system, I am subject to the laws and regulations administered by that system.</li> <li>• I understand that in order to retain the benefits of reciprocity, my contributions may not be withdrawn from CCCERA or any reciprocal public agency retirement system while I am in employment as a member of CCCERA or any reciprocal public agency. Furthermore, this information may be shared with the other retirement system.</li> <li>• Upon signing and returning this document, I am electing to coordinate retirement benefit rights between reciprocal retirement systems, where applicable, and I understand I must retire from all reciprocal systems concurrently.</li> </ul>	

Section 3: MEMBER ACKNOWLEDGMENT OF INFORMATION	
Sworn statement – Pursuant to Code 31526 and Code of Civil Procedure Section 2015.5, I declare, under penalty of perjury, that the foregoing statements are full, true, and correct.	
Member's Signature (Required)	Date (mm/dd/yyyy)

Section 4: EMPLOYER CERTIFICATION (To be completed and signed by employer or authorized representative)			
I certify that the above-named applicant is an employee and that the information is complete and correct to the best of my knowledge, and I have verified the following information.			
Full Name of Enrolling Member	Social Security Number	Date of Birth (mm/dd/yyyy)	
Job Title of Enrolling Member	Date of Permanent Employment (mm/dd/yyyy)		
Employer Name	Working Status (Full Time/Part Time)	Scheduled Hours Per Week	
Employer Representative Signature	Employer Representative Name (PLEASE PRINT)	Date (mm/dd/yyyy)	

## Reciprocity

As a member of CCCERA, you may be eligible for the benefits of reciprocity. Reciprocity is an agreement among public retirement systems to allow members to move from one public employer to another public employer within a specific time limit without losing some valuable privileges related to your retirement benefits.

There is no transfer of funds or service credit between retirement systems when you establish reciprocity. You become a member of both systems and are subject to the membership obligations and rights of each system (for example, minimum retirement age may vary between systems), except as modified by the reciprocity agreement. You must apply to retire from each system separately, and you will receive separate retirement allowances from each system. **You must retire on the same date from each public retirement system participating in a reciprocal agreement for all benefits of reciprocity to apply.**

## Reciprocal Retirement Systems

CCCERA is reciprocal with the other county retirement systems under the 1937 Act, as well as CalPERS and any system that has a reciprocal agreement with CalPERS. To verify whether a system has reciprocity with CCCERA, contact our office.

## Reciprocity Benefits & Requirements

The following benefits and requirements apply to CCCERA members who make a qualified move between reciprocal retirement systems.

- **Legacy Benefit Tier:** The California Public Employees' Pension Reform Act of 2013 (PEPRA) requires new benefit tiers for new members on or after January 1, 2013. Reciprocal members who were in a legacy (pre-PEPRA) tier with a prior reciprocal employer will be eligible for a legacy tier with CCCERA.
- **Member Contribution Rate Based on Age at Entry (Legacy Tiers Only):** Retirement formulas for CCCERA legacy tier members are based on age at entry; with a lower age at entry generally meaning a lower contribution rate. CCCERA uses the age at entry of the first reciprocal system to determine the contribution rate.
- **Highest Final Compensation:** CCCERA will compute your average final compensation based on the highest rate of pay under any system, as long as you retire on the same date from all systems. Systems will use either a 12- or 36-month consecutive highest final compensation depending on benefit tier.
- **Qualification for Benefits:** Service earned under all reciprocal systems may be used to meet each system's vesting and retirement eligibility requirements.

## Reciprocity Requirements

When changing retirement systems, you must satisfy several statutory conditions, as follows, in order to receive the full benefits of reciprocity:

- **Maintain Membership:** You must continue membership in the first retirement system by leaving your service credit and contributions (if any) on deposit.
- **Movement to a New Reciprocal System:** You must have a date of membership in the new system within six months of leaving the old system. When entering CCCERA the six months is extended to one year if termination was due to lay off because of a lack of work, a lack of funds, or a reduction in workforce.
- **No Overlapping Service:** You must discontinue your employment relationship from the first system before entering employment with the subsequent system.
- **Concurrent Retirement between Reciprocal Systems:** In order to receive full reciprocal benefits, you must retire on the same date from both or all systems by submitting a retirement application in accordance to the rules and regulations associated with each system.
- **Exceptions and Restrictions:** Certain exceptions and restrictions may exist. Eligibility for reciprocity is determined by the retirement laws in effect at the time of movement between retirement systems.

## Important Restrictions

- **Concurrent Employment:** Reciprocity does not apply when your employment under the first retirement system overlaps your employment under the new system. For the benefits of reciprocity to apply, you must terminate employment under the first system prior to employment in the new system. Reciprocity may not be established even if the overlapping time is due only to using vacation or leave time with the first employer while becoming member of the new system.
- **Refund Restriction:** Some retirement systems may not allow you to withdraw your member contributions while you are employed in a position covered by a reciprocal retirement system.

## Reinstatement From Retirement

If in the future you reinstate to active employment in a CCCERA-covered position and have retired under reciprocity, there is no provision in the law to allow you to apply reciprocal rights to your subsequent retirement since you will no longer be retired from both systems on the same date.

If you have any questions regarding reciprocity, including the requirements, restrictions or benefits of reciprocity, contact our office.