



RETIREMENT ESTIMATE REQUEST

ALAMEDA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION
475 14th Street, Suite 1000
Oakland, CA 94612-1900

(510) 628-3000
FAX (510) 268-9574

(Please Print or Type)

Name: _____ Social Security Number: _____ - _____ - _____

Address: _____ City: _____ State: _____ Zip: _____

Birthdate: _____ / _____ / _____ Phone Number: (____) _____ - _____

Any other name used? No Yes* If yes, list name: _____

Marital Status: Single Married* Divorced Sex: Male Female

* Spouse's name, if married: _____ Spouse's date of birth: _____

Membership Status: *Check one*

Current ACERA Member Deferred Member Deferred Transfer Member*

* Deferred transfer members; list current employer: _____

* Deferred transfer members; list current monthly salary: _____

Check all that apply:

RETIREMENT ALLOWANCE ESTIMATE

#1 – Date of Retirement: _____
Month Day Year

#2 – Date of Retirement: _____
Month Day Year

- ACERA cannot provide you with an estimate without having an approximate date you intend to retire.
- You may request a retirement estimate for more than one date.
- Retirement estimates are based upon current highest average salary levels, ACERA cannot provide estimates with projected salary.
- Submitting a request for a retirement estimate is not the same as submitting an application for Service Retirement.
- A SERVICE TIME AUDIT will be performed on your retirement allowance estimate.

ACCOUNT BALANCE – This information provides the current balance of employee paid contributions plus interest in your retirement account.

OTHER: _____

Member Signature

Date

ACERA USE ONLY

Date Received: _____
Date Processed: _____
Processed by: _____