

Retirement Planning Worksheet



For instructions, watch a recording of the Pre-Retirement Webinar at acera.org/seminars.

Name _____

My Career Timeline

Approximate Dates

ACERA Entry Date	
Vested Date	
Retirement Eligibility Date	
Date to Submit Ready-to-Retire Counseling Form acera.org/counseling	
Separation Date (Last Day in Active Pay Status)	

Projected Retirement Date

My Tier

General

Tier 1

Tier 2

Tier 3

Tier 4

Safety

Tier 1

Tier 2B

Tier 2C

Tier 2D

Tier 4

Estimating My Retirement

Get a Ballpark Estimate

Retirement Age	
Years of Service Credit at Retirement	
Ballpark Salary % acera.org/ballpark	%
Highest Average Monthly Salary	\$
= Ballpark Estimate*	\$

* Actual benefit may be slightly less due to social security reduction.

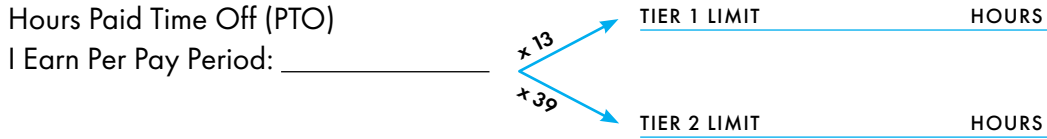
Get a Precision Estimate With the Online Benefit Estimator

acera.org/wms

Separation Date	
Projected Retirement Date	
Hours of Cash Vacation Compensation (optional)	
Precision Estimate	\$

Calculate My Vacation Compensation Limit – Tiers 1 & 2

Alameda Health System Employees

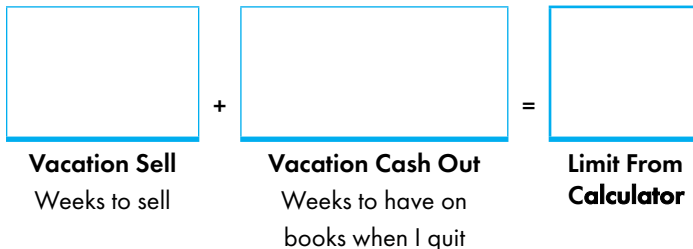


Exception: Limits for AHS employees in UAPD Union are 120 hours of PTO for Tier 1 and 360 hours of PTO for Tier 2.

County and Other Employees

	Year 1	Year 2 (Tier 2 Only)	Year 3 (Tier 2 Only)
Earned Weeks of vacation I earn per year			
Payable Weeks of vacation I'm allowed to sell per year			

To maximize my earned retirement:



Get
Limit from
Calculator

How to Calculate Hours of Cash Vacation Compensation for Online Benefit Estimator

1. Run an estimate leaving the Hours of Cash Vacation Compensation field blank. Look at the Average Salary Date Range on the estimate PDF.

Limit From Calculator (weeks)	
\times Weekly Work Hours	
= Limit (hours)	AHS Start Here
Hours Vacation Sold - During Salary Date Range	
Hour of Cash Vacation Compensation for Benefit = Estimator	

2. Run a second estimate using Hours of Cash Vacation Compensation.

See calculators at acera.org/vacation