



RECIPROCITY INQUIRY FORM

NAME: (FIRST)	(MIDDLE)	(LAST)	Staff Use Only: New Member: Active: Member Date:	
ADDRESS: (NUMBER)	(STREET)	(CITY)		(STATE) (ZIP CODE)
PHONE: (WORK)	(SOCIAL SECURITY NUMBER)			

Dear Member:

Please complete the information requested below if you terminated employment/membership with the California Public Employees' Retirement System (CalPERS) or a California public agency that is a CalPERS system or has a reciprocal agreement with CalPERS. Reciprocity provisions may apply if your membership date with the San Francisco Employees' Retirement System (SFERS) is after your termination date from the prior reciprocal plan but does not exceed 6 months from the prior plan's termination date. Read the enclosed Reciprocity flyer for a summary of the Reciprocity provisions.

Did you terminate employment/membership with the State of California or a California public agency prior to your employment with the City?:

No _____ **SIGN HERE** _____ **DATE** _____
Do not continue

Yes _____ *Please complete all information requested below*

Name of prior agency/retirement system:

Employment Date: _____

Termination Date: _____

SIGN HERE _____ **DATE** _____

SFERS will contact the prior agency/retirement system to verify your membership data with the prior plan. SFERS will then determine if you met the Reciprocity 6-months membership provision. You will be notified by SFERS in writing within 60 calendar days of receipt of this form if Reciprocity conditions were not met.

HOWEVER, you must contact the prior plan to inquire about whether or not the plan is reciprocal with CalPERS and to indicate that you are employed now with a reciprocal agency. SFERS cannot counsel you about benefits and options available to you with the prior plan.

TERMINATION AS A SFERS MEMBER: If you terminate employment with the City you must visit SFERS at the address below with a copy of your Separation Report to be informed about your SFERS options at termination and make an election about your retirement contributions: refund, reciprocity or vesting.