



San Francisco Employees' Retirement System

Domestic Partner Retirement Benefits

In November 1994, the voters of the City and County of San Francisco approved a Charter Amendment (Proposition H) that provides SFERS survivor benefits for domestic partners of SFERS members. Effective with the approval of Proposition H, eligible domestic partners of SFERS members can receive continuation benefits as a qualified survivor of a deceased SFERS member. In March 2004, the voters approved a Charter Amendment (Proposition D) which provides that domestic partners will be treated exactly the same as spouses for benefits under the San Francisco Employees' Retirement System.

How Does My Domestic Partner Become Eligible for SFERS Survivor Benefits?

The San Francisco Employees' Retirement System recognizes domestic partnerships that have been established by filing a Declaration of Domestic Partnership with the San Francisco County Clerk, as well as domestic partnerships or similar legal relationships formed and recognized in other jurisdictions (e.g. domestic partnerships filed with the State of California or other California jurisdictions, civil unions).

In order for a domestic partner to be eligible for SFERS survivor continuation benefits, the following requirements must be met:

- ◆ You must have no surviving spouse at the time of your death;
- ◆ Your surviving domestic partner must provide SFERS with documentation of the domestic partnership, civil union, or similar legal relationship issued by another jurisdiction in a form that is equivalent to the records that SFERS relies upon to verify marriages;
- ◆ You must designate your domestic partner as your SFERS sole primary beneficiary; and
- ◆ For New Plan Safety and New Plan Miscellaneous Members: Your domestic partnership must be valid for at least one full year immediately prior to your date of retirement and continue in effect until your death or be valid for at least one full year immediately prior to your date of death if you die while an active City employee.
- ◆ For Old Plan Safety and Old Plan Miscellaneous Members: Your domestic partnership must be valid for at least one full year immediately prior to your date of death regardless of whether you die before or after retirement.

Domestic partnerships formed only by notarization of a Declaration of Domestic Partnership as provided in Chapter 62, San Francisco Administrative Code will not be recognized for retirement purposes. Such domestic partnerships must be registered or certified by the jurisdiction in order to be eligible for qualified survivor treatment under the provisions of SFERS.

What SFERS Retirement Benefits Will My Domestic Partner Receive?

The type and amount of SFERS death benefits depend on a number of conditions at the time of your death including; your membership status (active employee or retired member) and your survivors (qualified survivor and/or designated beneficiaries). Your domestic partner who meets the requirements detailed above will be considered a qualified survivor for retirement system purposes. Any monthly continuation benefit payable to your surviving domestic partner will be payable until his/her death, marriage or establishment of a new domestic partnership.

**PLEASE VISIT THE SFERS OFFICE IF YOU HAVE ANY QUESTIONS REGARDING YOUR DOMESTIC PARTNERSHIP.
DO NOT MAIL DOMESTIC PARTNERSHIP DOCUMENTS TO OUR OFFICE WITHOUT FIRST CONSULTING
WITH SFERS STAFF.**