



OSCAR PETERS  
RETIREMENT ADMINSTRATOR

## Reciprocity Request Form

Date Form Sent to Member:

**IMPORTANT:** *This form must be completed and returned to Specialist named at bottom of this page.*

### RECIPROCIITY: COORDINATION WITH OTHER PUBLIC RETIREMENT SYSTEMS

SBCERS has agreements with many counties and other public agencies which permit movement from public employer to public employer within a specified time limit without loss of retirement rights. This is called "reciprocity".

In addition to PERS, STRS, and JUDGE'S RETIREMENT SYSTEM, the following public retirement systems within California have entered into an agreement with SBCERS for reciprocity:

**COUNTIES OF:**

Alameda	Kern	Merced	San Diego	Sonoma
Contra Costa	Los Angeles	Orange	San Joaquin	Stanislaus
Fresno	Marin	Sacramento	San Luis Obispo	Tulare
Imperial	Mendocino	San Bernardino	San Mateo	Ventura

### ADVANTAGES OF ESTABLISHING RECIPROCIITY ARE:

- FINAL COMPENSATION EXCHANGE: Your SBCERS benefits will be computed using the highest final compensation you earned under either system. **You must retire from both systems on the same date and identify the other retirement system on your retirement application.**
- MINIMUM SERVICE REQUIREMENTS: Your service under both systems will be combined to determine eligibility for benefits under both systems.
- DISABILITY RETIREMENT: If you qualify for a disability retirement from the other system, you will also receive an allowance from SBCERS providing you retire from both systems on the same date.
- BASIC/SPECIAL DEATH BENEFIT: SBCERS always pays at least the amount of your accumulated contributions.
- EMPLOYEE CONTRIBUTION RATE: If a variable contribution rate based on age applies, your age at entry into SBCERS may allow you a lower contribution rate in the other system.
- REFUND: You may be eligible for a refund if this form is returned to SBCERS in a prompt manner.

### IN ORDER TO ESTABLISH RECIPROCIITY BETWEEN SBCERS AND THE OTHER SYSTEM YOU MUST:

1. Leave covered employment and join a reciprocal system within **180 days** of separation.
2. Elect to leave your contributions on deposit with both systems
3. Inform SBCERS of the name of the public agency in which you were employed.

*I have read the information provided to me regarding reciprocity and wish Santa Barbara County Employees Retirement System to:*

*Establish reciprocity on my behalf with the following California public retirement system, OR*

**DO NOT establish reciprocity on my behalf.**

\_\_\_\_\_  
(Other Retirement System)

\_\_\_\_\_  
(Signature & Date)

\_\_\_\_\_  
Print Your Name

\_\_\_\_\_  
(Social Security Number)

**Return this form to Retirement Office Benefits Specialist** \_\_\_\_\_

\_\_\_\_\_  
Name of Specialist

May be returned by INTEROFFICE or U S Postal Service delivery