

Request for Retirement Initiation Packet (Includes Your Personal Retirement Profile)

Submit this form 3–4 months before your retirement date to the Retirement Administration Service Center (RASC) via e-fax to: 800-792-5178 or via mail to: University of California—RASC, P.O. Box 24570, Oakland, CA 94623-1570. Your retirement packet will not be generated until you are within 90 days of your retirement date.

Retiree Name (Last, First, Middle Initial)		Campus Location
Birth Date	Daytime Phone	Home Phone
Retirement Date:	Separation Date	Email Address
Home Mailing Address		

Are you a faculty member? Yes No

Do you anticipate any changes in your current appointment prior to retirement? Yes No

If yes, please explain:

ELIGIBLE SURVIVORS

Do you have any eligible survivors? Yes No

NOTE: A survivor may include spouse/domestic partner, dependent children (unmarried under the age of 18, or 22 if full-time student(s) or disabled), and/or dependent parents.

If yes, please provide name(s), birth date(s), relationship(s) and marriage/partnership date below:

Name (Last, First, Middle Initial)	Birth Date	Relationship	Marriage/Partnership Date
Name (Last, First, Middle Initial)	Birth Date	Relationship	
Name (Last, First, Middle Initial)	Birth Date	Relationship	

If you have a spouse/domestic partner, is he/she also a UC employee/retiree? Yes No

If you have an eligible child, is he/she disabled? Yes No

If yes, please provide the disability date:

Send completed form to:
University of California—RASC
P.O. Box 24570
Oakland, CA 94623-1570

For more information contact RASC:
800-888-8267, M–F, 8:30–4:30 PM, PT.

UNIVERSITY
OF
CALIFORNIA

Retirement
Administration
Service Center

Retiree Name (Please Print: Last, First, Middle Initial)

CONTINGENT ANNUITANT

A contingent annuitant is a person to whom you choose to leave a monthly benefit after your death. To provide this benefit, you receive a reduced monthly benefit while you are alive. The person does not need to be an eligible survivor. You may name only one contingent annuitant. For more information, see the Retirement Handbook.

Do you want to name a contingent annuitant? Yes No

If yes, please provide the name and birth date of your contingent annuitant

Name (Please Print: Last, First, Middle Initial)

Birth Date

DO YOU HAVE CALPERS/CALSTRS SERVICE?

Do you have any prior service with an employer under the Public Employees' Retirement System (PERS) or the State Teachers' Retirement System (STRS)? Yes No

If yes, do you expect to apply for separate retirement benefits from either of these plans? Yes No

If yes, do you anticipate your 36-month average salary from CalPERS or CalSTRS to be higher than your UCRP highest average monthly salary? Yes No

NOTE: Benefits under PERS reciprocity requires the same retirement date as your UCRP retirement date.

ARE YOU MOVING?

Will you be moving upon retirement? Yes No

Move Date

Phone

New Address

UCRP ACTIONS

Do you have any current UCRP actions in progress? If so, please indicate below.

(These may include UCRP service credit buyback, pending UCRP service credit inquiry, UCRP Disability Income application and/or divorce settlement.)