

# Request for Retirement Initiation Packet

**Submit this form 3 months before your retirement date to the Retirement Administration Service Center (RASC) via fax to: 800-792-5178**

**or mail to:** University of California—RASC, P.O. Box 24570, Oakland, CA 94623-1570. Any forms submitted 4 months prior to your retirement date will not be processed; you will need to complete and submit a new form within 3 months prior to your retirement date. **Please keep a copy of this form for your records.**

Retiree Name (Last, First, Middle Initial)		UC Location
Birth Date (mm/dd/yyyy)	Daytime Phone	Home Phone
Separation Date (last working day/on active payroll) (mm/dd/yyyy)	Retirement Date (mm/dd/yyyy)	Email Address
Home Mailing Address		
Are you a faculty member? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you anticipate any changes in your current appointment prior to retirement? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please explain: _____		
Are you on an Leave of Absence (LOA)? <input type="checkbox"/> Paid LOA <input type="checkbox"/> Unpaid LOA End date of your LOA (mm/dd/yyyy): _____		
Are you paying UCPath to continue your UC insurance coverage while on leave? <input type="checkbox"/> Yes <input type="checkbox"/> No		

## ELIGIBLE SURVIVORS

Do you have any eligible survivors?  Yes  No

**NOTE:** An eligible 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 (mm/dd/yyyy)	Relationship <input type="checkbox"/> Spouse <input type="checkbox"/> Domestic Partner	Date of Marriage/Partnership (mm/dd/yyyy)
Name (Last, First, Middle Initial)	Birth Date (mm/dd/yyyy)	Relationship <input type="checkbox"/> Child <input type="checkbox"/> Parent
Name (Last, First, Middle Initial)	Birth Date (mm/dd/yyyy)	Relationship <input type="checkbox"/> Child <input type="checkbox"/> Parent
If you have a spouse/domestic partner, are they also a UC employee/retiree? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If you have an eligible child, are they disabled? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Name (Last, First, Middle Initial)		Disability Date (mm/dd/yyyy)

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, 7:00 AM–4:30 PM PT

**UNIVERSITY  
OF  
CALIFORNIA**

**Retirement  
Administration  
Service Center**

RETN: Pending (W6/24)

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

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## CONTINGENT ANNUITANT

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You may be able to name a contingent annuitant, if desired. If your contingent annuitant is more than 10 years younger, and not your spouse/domestic partner, some of the options may not be available, due to Internal Revenue Code regulation Minimum Distribution Incidental Benefit (MDIB). Please see UCnet for more information.

Do you want to name a contingent annuitant?  Yes  No

If yes, please provide the following information for your contingent annuitant. A contingent annuitant must be a person and you can only name one person.

Name (Last, First, Middle Initial)

Birth Date (mm/dd/yyyy)

Relationship

Spouse  Domestic Partner  Child  Parent  Other

Is your Contingent Annuitant's address the same as yours?  Yes  No

Address

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## DO YOU HAVE CALPERS/CALSTRS SERVICE?

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**California Public Employees' Retirement System (CalPERS):** (Benefits under CalPERS reciprocity requires the same retirement date as your UCRP retirement date. See the UCRP/CalPERS Reciprocity Factsheet found on UCnet for requirements.  
<https://ucnet.universityofcalifornia.edu/forms/pdf/ucrp-calpers-reciprocity.pdf>)

Do you have prior/current service with an employer under the California Public Employees' Retirement System (CalPERS)?

Prior CalPERS service  Current CalPERS service

Have you established reciprocity with CalPERS?  Yes  No

Have you submitted the UBEN 157 Election of Reciprocity form to RASC?  Yes  No

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

If yes, do you plan to apply for separate retirement benefits using the same retirement date?  Yes  No

**California State Teachers' Retirement System (CalSTRS):** (Concurrent retirement under CalSTRS requires you were an active UCRP member on or after July 1, 2002 and must be vested under one system to retire. See the Concurrent Retirement Factsheet found on UCnet for requirements.  
<https://ucnet.universityofcalifornia.edu/forms/pdf/ucrp-calstrs-concurrent-retirement.pdf>)

Do you have prior/current service with an employer under the California State Teachers' Retirement System (CalSTRS)?

Prior CalSTRS service  Current CalSTRS service

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

If yes, do you plan to apply for separate retirement benefits using the same retirement date?  Yes  No

If no, will you continue working at your employer CalSTRS?  Yes  No

**NOTE:** Retirement can only be processed after CalPERS/CalSTRS provides data to RASC, typically 30 days after retirement date.

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

**ARE YOU MOVING?**

Will you be moving upon retirement?  Yes  No

Move Date (mm/dd/yyyy)

Phone

New Address

**UCRP ACTIONS** (additional information can be found on UCnet <https://ucnet.universityofcalifornia.edu/>)

- UCRP Service Credit Verification, UBEN 132 – If you have submitted a UCRP Service Credit Verification inquiry it **must be completed by RASC** before the retirement process is completed.
- UCRP Service Credit Purchase (SCP) Information Request form, UBEN 169 – If you have submitted a UCRP Service Credit Purchase, UBEN 169 with all required supporting documents it **must be completed with payment received and cleared by RASC** before the retirement process is completed (may take 6 months or more to complete a valid SCP).
- UCRP Disability can be submitted and processed at the same time as retirement. UCRP Disability is separate from Voluntary Short- or Long-Term Disability.
- QDRO – If you have submitted any documents for a QDRO the Final Judgment of Dissolution AND Marital Settlement Agreement documents **must be submitted, reviewed and completed by RASC** in order for your retirement to be processed. Documents must include language and decisions by both parties regarding UC's retirement, specifically the Monthly Retirement Income and Lump Sum Cashout options.
- Other \_\_\_\_\_

**You are not done with your retirement!**  
**Please keep a copy of this form for your records.**

