

**QUESTIONNAIRE FOR NEW RETIREES – ALL MEMBERS**

1. What is your current payroll status?  
Active \_\_\_\_\_ Leave with pay \_\_\_\_\_ Leave without pay \_\_\_\_\_ Other \_\_\_\_\_
2. Are you now receiving your highest salary while employed by the City of Los Angeles?  
YES \_\_\_\_\_ NO \_\_\_\_\_ If No, When? \_\_\_\_\_
3. Do you have any Part-Time service with the City of Los Angeles?  
NO \_\_\_\_\_ YES \_\_\_\_\_ If Yes, When? \_\_\_\_\_
4. Have you ever worked for the Department of Water and Power (DWP)?  
NO \_\_\_\_\_ YES \_\_\_\_\_ If Yes, When? \_\_\_\_\_
5. Are you paying off a Service Credit Purchase contract?  
NO \_\_\_\_\_ YES \_\_\_\_\_  
If yes, prompt payment will help speed the processing of your case. To avoid delays in processing your retirement benefits, please pay off your contract at least two weeks before your retirement date.
6. Do you intend on purchasing additional service credit before you retire?  
NO \_\_\_\_\_ YES \_\_\_\_\_ If Yes, For What Time Period? \_\_\_\_\_  
If yes, please provide ample time before your retirement date for calculating your cost. Note: It can take approximately six or more months to process a Service Purchase. In addition, all payments must be completed before you retire.
7. Are you on the 9/80 or 4/10? NO \_\_\_\_\_ YES \_\_\_\_\_  
If Yes, what is/are your day/days off? \_\_\_\_\_
8. Will you work for another government agency after retirement?  
YES \_\_\_\_\_ NO \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
If yes, please discuss possible reciprocity options with your counselor.
9. Do you have reciprocity with another government agency within California?  
NO \_\_\_\_\_ YES \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
Note: There are specific conditions for reciprocity. The retirement date must be the same for all reciprocal systems. Please discuss with your retirement counselor if this applies to you.
10. Are you on Worker's Compensation now, or have you ever received temporary disability payments (State Rate)?  
NO \_\_\_\_\_ YES \_\_\_\_\_ If Yes, When? \_\_\_\_\_  
Note: You **may** be entitled to purchase the time that you were on state rate.

**Questionnaire For New Retirees – Page 2 of 2**

11. Do you have a wage assignment or garnishment being deducted from your current City of Los Angeles paycheck? NO \_\_\_\_\_ YES \_\_\_\_\_  
If yes, some wage garnishments may continue on your LACERS retirement allowance.

12. Do you have Larger Annuity Funds on account with LACERS?  
YES \_\_\_\_\_ NO \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
If yes, your funds on account cannot remain with LACERS once you have retired. Please discuss your options with your retirement counselor.

13. Are you interested in purchasing a Larger Annuity from LACERS before your retirement date?  
NO \_\_\_\_\_ YES \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
If yes, this is an optional program that must be purchased prior to retirement.

14. Are you qualified to receive Social Security Benefits?  
NO \_\_\_\_\_ YES \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
Note: You may be eligible to receive Social Security Benefits if you have 40 or more quarters in the Social Security System. There may be an offset if you receive a government pension. Check with the SSA at (800) 772-1213.

15. Are you eligible to receive Medicare Part A?  
NO \_\_\_\_\_ YES \_\_\_\_\_ DON'T KNOW \_\_\_\_\_  
Note: You may be eligible to receive Medicare Part A if you have 40 or more quarters in the Social Security System. All retirees will be eligible for Medicare Part B, upon reaching age 65. The Social Security Administration will charge you for the Medicare benefit. LACERS will only reimburse retirees who are covered by both Part A and Part B, and are enrolled in a LACERS medical plan.

**Please provide LACERS with a letter of eligibility from the Social Security Administration if you are age 65 or over.**

16. Do you plan to move to another State in the near future?  
NO \_\_\_\_\_ YES \_\_\_\_\_ If Yes, When? \_\_\_\_\_  
Note: You may wish to meet with a LACERS Health Advocate to discuss your Health and Dental Insurance Options and /or reimbursement eligibility.

Member's Signature	Social Security Number	Date Signed

**ADA NOTICE**

As a covered entity under Title II of the Americans with Disabilities Act, the City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodations to ensure equal access to its programs, services and activities.