

**ELECTION OF OPTIONAL MEMBERSHIP - STATE APPOINTEE**

The Public Employees' Retirement Law (PERL) provides "optional" membership rights for certain public officers and employees. Those eligible "optional" members are excluded from membership unless and until a written election for membership is filed with the California Public Employees' Retirement System (CalPERS).

California Government Code Section 20320 provides that a person directly appointed by the Governor, without the nomination of any officer or board, or an officer or an employee directly appointed by the Attorney General, Lieutenant Governor, Controller, Secretary of State, Treasurer, or Superintendent of Public Instruction is exempt from civil service under Article VII of the California Constitution, except those appointed pursuant to subdivision (i) of Section 4 thereof, is excluded from membership in CalPERS unless he or she files with the Board of Administration an election in writing to become a member. Government Code Section 20321 provides that persons appointed to the office of the Adjutant General or Assistant Adjutant General after October 1, 1961, shall have rights to membership in CalPERS and shall have no rights under the retirement benefit provisions of the Military and Veterans Code, except that persons entitled to retirement benefits under the Military and Veterans Code appointed to the office of the Adjutant General or Assistant Adjutant General shall continue to receive military retirement benefits during their term of office.

State Appointees subject to this section should consider the following:

- You may elect CalPERS membership at any time while you are a compensated appointee holding the appointed office as long as the office is not otherwise excluded by law.
- Once elected, your membership remains in effect for all future service in this appointed position with the same employer unless there is a break in employment.
- Your membership may be terminated only upon permanent separation from employment covered by CalPERS and subsequent withdrawal of retirement contributions.
- While you are a CalPERS member, you may request costing information to purchase any previous eligible service in your appointed position at any time prior to retirement.
- The form to request costing information for Optional Member Service is available on the CalPERS website at **www.calpers.ca.gov**. The form is titled ***Request for Service Credit Cost Information – Layoff, Prior Service, and Optional Member Service*** (PERS-MSD-372) and is located in ***A Guide to Your CalPERS Service Credit Purchase Options*** (PUB 12).
- If your election for optional membership in CalPERS will result in concurrent service with employment credited in a private benefit plan or another public retirement system, please contact that organization for information regarding the impact of such concurrent service.
- If your election will result in concurrent employment under CalPERS, please contact the Employer Account Management Division at the above telephone number before completing this election form.

**Please note:** Board/commission/committee positions "with nomination" are not eligible for optional membership but qualify under standard membership eligibility under Government Code Section 20305. Refer to the Public Employees' Retirement Law and the State Reference Guide for further information my|CalPERS 0842

on State appointees. Any questions on membership eligibility may be directed to the Employer Account Management Division, Membership Management Section, at the telephone number below.

We are here to assist you. Please visit our website **[www.calpers.ca.gov](http://www.calpers.ca.gov)**, or you may contact us toll free at **888 CalPERS** (or **888-225-7377**).

Employer Account Management Division

**Please complete and return this entire form to your Human Resources Office to establish your membership in CalPERS.**

**I am an appointed officer as defined in Government Code Section 20320 or 20321, being the**

(Officer/Position Title) \_\_\_\_\_ of the

(State Agency) \_\_\_\_\_.

I was first appointed on \_\_\_\_/\_\_\_\_/\_\_\_\_.

My present term will expire on \_\_\_\_/\_\_\_\_/\_\_\_\_.

Agency Contact \_\_\_\_\_

Agency Telephone \_\_\_\_\_

In accordance with the provisions of Government Code sections 20320 or 20321, **I elect to become a member of CalPERS.** I request that this election be filed with the CalPERS Board of Administration as my election to become a member.

**I understand this election is irrevocable as long as I remain in the appointed position with the same employer.**

(Printed Name in Full)	(Signature)	(Date)
(CalPERS ID or Social Security Number)	(Address)	
(Daytime Telephone Number)	(City & State)	(ZIP Code)

**Notice to Employer:** The membership date for an optional member is the date CalPERS receives and files the Election of Optional Membership form.