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PERS Tier One/Tier Two Former Registered Domestic Partner Award of Separate Account to Alternate Payee

Section A: Member and alternate payee (AP) information (Type or print clearly in dark ink.)

Member name	PERS number (optional)
AP name	

AP information

- The AP’s account will be established as soon as administratively feasible after PERS receives the final court order and approves the forms.
- The AP cannot apply for retirement before the earliest date the member is eligible to retire. The AP must apply for retirement for payments to begin. The AP has the same retirement options available to the member, other than a joint and survivor annuity. The AP is not entitled to cost-of-living adjustments or other retirement allowance increases until it is paid to the member or on behalf of the member.
- The AP may not distribute the account until the member has separated from all PERS-covered service.
- If the AP dies before retirement, the AP’s account will be paid to the beneficiary designated by the AP or, if no beneficiary is designated, to the AP’s estate.
- All taxes withheld will be attributed to the member.
- The one-time \$300 administrative fee will be subtracted when the member and the AP receives his/her disbursements. The fee will be allocated between the member and the AP based on the percentage of the member account unless otherwise directed by the court order.

Section B: Award information

The member’s account is reduced by a specified amount (as designated below), and the funds are transferred into a separate account in the AP’s name.

1. Date of separation, dissolution of registered domestic partnership, or property settlement is _____.
 If no date is provided, PERS will use the date the judge signed the court order. (mm/dd/yyyy)

The separate account will be established from the member’s account balance as of December 31 of the year before the above date unless a prior year is provided here: _____. If the above date is December 31, the account will be established as of that date.

2. Award to AP (Choose one.)
 Percentage in up to two decimal points _____ **or**
 Dollar amount \$ _____.

3. Is the AP awarded a share of employer matching dollars? Yes No

Note: If the AP dies before payout or retirement, the AP may be entitled to additional death benefits payable under ORS 238.395 if the member would have been eligible to receive the employer death benefit. The AP’s beneficiary/estate is entitled to this additional benefit even if the AP was not awarded employer dollars.

Office use only		
<input checked="" type="checkbox"/> PERS	<input type="checkbox"/> OPSRP	<input type="checkbox"/> IAP
<input type="checkbox"/> Member <input type="checkbox"/> Alternate payee <input type="checkbox"/> Cross reference member SSN		