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LACERA Questionnaire – Los Angeles County Employees Retirement Association

Name of Member/LACERA Plan Participant: _____

Member’s Date of Plan Membership: _____ / _____ / _____

Name of Member’s Employer: _____

Member has accrued benefits under the following LACERA plans: (please check **all** that apply)

- Plan A Plan B Plan C Plan D Plan E Plan G

If the Member is RETIRED and is in pay status, answer the following questions:

Please contact LACERA at (626) 564-6000 if you need assistance with answering these questions.

Retirement Date: _____ / _____ / _____

Option elected at retirement:

- Unmodified Unmodified +Plus Option 1 Option 2 Option 3 Option 4

Option Beneficiary’s Name (if any): _____

What type of retirement is Member currently receiving?

- Disability Retirement **or** Service Retirement

If Member is receiving a Disability Retirement, is Member currently eligible for Service Retirement?

- Yes No

Please describe any agreement between the parties regarding the division of the LACERA benefits that is not addressed in your Marital Settlement Agreement or Judgment:

NOTE: LACERA requires a joinder before it can divide a Member’s benefits pursuant to a DRO. You may wish to contact your attorney, the court, or LACERA to see if a joinder has been filed already. If already filed, please send a copy of the joinder to QDRO Helper. **If no joinder has been filed, QDRO Helper offers joinder services for LACERA for an additional flat fee of \$200.00.**

I will require QDRO Helper’s joinder service: Yes No

Note: LACERA members may also have Defined Contribution Plan Benefits, under the County of Los Angeles i) Deferred Compensation and Thrift Plan (Horizons), ii) Savings Plan (401k), and/or iii) Pension Savings Plan and/or Termination Pay Pick Up Plan. Please contact QDRO Helper if you need assistance with the division of any of these County of Los Angeles Defined Contribution Plans.