CONTRA COSTA WATER DISTRICT
RETIREMENT ESTIMATE REQUEST FORM

Instructions:

1. Complete this form to request an estimate of your CCWD Retirement Plan pension.
2. Send the completed request to Human Resources.

Estimates may take up to 2-3 weeks to process.

EMPLOYEE DATA (please print):

Name: _____

Provide estimate(s) as of the following date(s), or age(s): 1. _____

2. _____

3. _____

If married, spouse's name & date of birth: _____

Plan Ahead:

- You must provide Human Resources with at least a 60-day advance notice prior to your desired retirement date if you want to assure timely retirement payments.

- If you have a Qualified Domestic Relations Order (QDRO), pension payments will **NOT** commence until the QDRO has been finalized. In these cases, you will need to notify HR at least 90 days prior to your desired retirement date.

- It is your responsibility as an employee to make all decisions regarding your retirement including designating the optimum form of benefit and date of retirement. Once you retire, you cannot change your payment option. Consult a financial advisor or tax specialist in advance of retirement to assist with making the best decisions for your circumstances.

- Once you retire, you are not allowed to change your health plan provider or add dependents to your health plan provider; however, exceptions are made if you subsequently move out of the service area of your plan. Therefore, the last opportunity to make changes to your medical plan is the Open Enrollment prior to your desired retirement date. Open Enrollment typically occurs in June of each year.

- You should periodically evaluate all of your sources of "retirement income", including other pension plans (PERS), deferred compensation, IRA's, savings accounts, Social Security, etc.

Acknowledgment: I request a pension estimate and have read and understand the above information.

_____ _____ _____

Employee Name Date Location / Extension