



DEATH DURING ACTIVE MEMBERSHIP

MEMBER ELECTION FORM
FOR OPTIONAL ALLOWANCE IN THE EVENT OF
DEATH DURING ACTIVE MEMBERSHIP

FORM

104

(Rev. 2023)

Purpose of the form: Form 104 authorizes CCCERA to file an application for non-service connected disability on your behalf, in the event that you are permanently incapacitated by reason of injury or other disability leading to death while you are an active member of CCCERA; it allows you to preselect an Optional Settlement, pursuant to CERL Section 31762 or 31764 or the successor section. This form is optional and is not required to be completed for CCCERA membership. Please contact CCCERA if you have any questions.

Instructions: Complete form in blue/black ink and return it to CCCERA. Submit original document only; fax/email copies will not be accepted.

Section 1: MEMBER INFORMATION

| | | |
|-----------|------------|----------------------------------|
| Full Name | Employee # | Last 4 of Social Security Number |
|-----------|------------|----------------------------------|



STOP – Your choice must match the beneficiaries chosen in your *Beneficiary Designation Form (Form 102)* and a SIGNATURE(s) and adult witness is required below in order for this form to be valid.

Section 2: ELECTION OF OPTIONAL SETTLEMENT

To the Board of Retirement:

- I choose Optional Settlement 2 (up to 100% continuance to one beneficiary) I only have 1 primary beneficiary listed on Form 102 – Beneficiary Designation Form.
- I choose Optional Settlement 4 (up to 100% continuance divided among more than one beneficiary) I have 2 or more primary beneficiaries listed on Form 102 – Beneficiary Designation Form.

Section 3: AUTHORIZATION TO FILE NON-SERVICE CONNECTED DISABILITY RETIREMENT APPLICATION

I understand that the beneficiary(ies) of the allowance that continues after my death is (are) the beneficiary(ies), having an insurable interest in my life, on file at CCCERA at the time of my death as were designated by me on a *Beneficiary Designation Form (Form 102)*, a separate form.

I understand that by signing this form I elect a monthly allowance for my beneficiary(ies) in lieu of any other death benefit including the return of accumulated contributions under CERL Section 31781.

I understand that this election is binding on me unless I withdraw this election before the first payment of any retirement allowance is made to me, and that at retirement I may make another election of an Optional Settlement, or choose to receive the unmodified allowance, under CERL.

In accordance with the provisions of CERL, I hereby authorize CCCERA to file an application for a non-service connected disability retirement on my behalf in the event that I am permanently incapacitated by reason of injury or other disability leading to death while I am an active member of CCCERA. I understand that, if granted, this will entitle my survivor(s) to receive a non-service connected disability retirement survivor continuance under Optional Settlement 2 or 4.

In accordance with the provisions of the County Employees Retirement Law of 1937 (CERL), and the by-laws and regulations governing the Contra Costa County Employees' Retirement Association (CCCERA), I hereby elect an Optional Settlement, pursuant to CERL Section 31762 or 31764 or successor section.

| | |
|--|-------------------|
| Member Signature (Required) | Date (mm/dd/yyyy) |
| Adult Witness Signature (Required; any adult witness may sign) | Date (mm/dd/yyyy) |
| Adult Witness Name (Print) | |

Contra Costa County Employees' Retirement Association
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Survivor Benefits: Active Member Death (Pre-Retirement)

Death and continuing benefits depend on several factors. If a member dies prior to retirement, death benefits are determined based on:

- Member status (active or deferred)
- Category of death (service-connected or non-service connected)
- Retirement Service Credit
- Relationship of recipient to member (eligible survivor or named beneficiary)

To qualify as an eligible survivor in cases involving the death of an active member, a spouse or domestic partner must have been married to or in a duly registered California domestic partnership with the member prior to the member's death. No minimum length of marriage or domestic partnership requirement applies.

| Type of Death | Basic Death Benefit | Optional Death Allowance |
|--|---|--|
| Service-Connected | Lump-sum payment of member's accumulated contributions Salary Death Benefit: one month of member's compensation earnable for each full year of Service Credit (not to exceed six months of compensation) | Full amount (100%) of disability retirement allowance deceased member would have received had he or she been retired on an Service-connected Disability at the time of death |
| Non-Service Connected | Lump-sum payment of member's accumulated contributions Salary Death Benefit: one month of member's compensation earnable for each full year of Service Credit (not to exceed six months of compensation) | 60% of disability retirement allowance deceased member would have received had he or she been retired on an Non-service Connected Disability* at the time of death |
| Deferred Member | Lump-sum payment of member's accumulated contributions | |
| <i>*In order for the survivor to be eligible for the Optional Death Allowance following a non-service connected death, the member must have been eligible for a retirement in the event of a non-service connected disability.</i> | | |

NON-SERVICE CONNECTED DISABILITY

A non-service connected disability means a member's permanent illness or injury did not arise from his or her employment. Members who qualify for a non-service connected disability retirement will receive the service retirement allowance to which the member is entitled, or one-third of your annual Final Average Salary, whichever is greater.