

University of California Retirement Plan (UCRP)

Personal Retirement Profile (PRP)

(PRP request can only be processed within 90 days of retirement/cashout date)

| | | | |
|------------------------|------------------------|----------------------------|---------------|
| Name (Last, First, M.) | Social Security Number | Z Number | Date of Birth |
| E-mail Address | Phone Number | Group | MS |
| Group & Division | Supervisor | Supervisor's email address | |

Employee's managers will be notified when an employee begins retirement proceedings to ensure exit and knowledge transfer communications are occurring.

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|----------------------------|-----------------|-----------------|
| Retirement or Cashout Date | Separation Date | Date of Request |
|----------------------------|-----------------|-----------------|

| | | | |
|--------------------------|---------------|------------------------|------------------|
| Spouse (Last, First, M.) | Spouse's SSN# | Spouse's Date of Birth | Date of Marriage |
|--------------------------|---------------|------------------------|------------------|

| | | |
|--|---------------------------|------------------------------------|
| Contingent Annuitant (Last, First, M.) | Contingent Annuitant SSN# | Contingent Annuitant Date of Birth |
|--|---------------------------|------------------------------------|

Additional Information:

yes or no

Has a Qualified Domestic Relations Order (QDRO) been filed on your account?

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Have you previously retired under UCRP?

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Have you ever received UCRP disability income?

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Do you have any UCRP eligible children or adult dependents?

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Are you a Public Employees' Retirement System (PERS) Member?*

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*If yes, how many PERS years of service do you have?

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What is your Tax Filing Status?

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What schedule are you on?

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Benefits Office Use Only

Appointment Set By _____ Date _____

Seen By _____ Appointment Date & Time _____