



**Board Governance Policy**

# **Membership Application and Designation of Beneficiary Policy**

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## **I. Purpose**

- A. The Board of Retirement (Board) and designated staff have a fiduciary duty to maintain membership records and enroll employees of participating employers who meet the Board's qualifications as well as designate their beneficiaries for a defined benefit through SJCERA.
- B. To execute this mission, the Board is promulgating this policy in order to capture the processes necessary to enroll new members and designate their beneficiaries.

## **II. Application for Membership**

- A. Every employee of the County of San Joaquin or a participating employer who is or becomes a member of SJCERA shall complete a Member Certification form supplied by SJCERA, including the employee's date of birth, date employment began, and employing department or participating employer. It is the appointing authority's duty to ensure that all eligible employees complete the required form and to forward immediately to SJCERA.
- B. In lieu of a Member Certification form, a submission by the member's employer to the retirement association with the information otherwise required in paragraph (A) is acceptable as the member's application for membership.
- C. Every employee who is eligible for SJCERA membership shall submit proof of age as outlined in the Board policy.
- D. In the event of a discrepancy in age, the birth date resulting in the oldest age for determining age-based contribution rates shall prevail.

## **III. Designation of Beneficiary**

- A. Every member at the time of retirement shall submit evidence of marriage or registered domestic partnership (RDP) if the member's designated beneficiary is the member's spouse/RDP and the member elects an option pursuant to Sections 31760 et seq. of the Government Code. In lieu of a marriage or registered domestic partnership certificate, alternative documents as determined by Board policy will be accepted.
- B. Every member, at the time of retirement, shall submit proof of age for any designated beneficiary or beneficiaries selected pursuant to the exercise of

an option contained within Section 31760 et seq. of the Government Code. Proof of age shall be as described by the Age Verification policy .

- C. RDPs, as defined in California Family Code Section 297, of SJCERA members have the same rights, protections, and benefits, and are subject to the same responsibilities, obligations, and duties as are granted to or imposed upon spouses of SJCERA members.

**IV. Law Prevails**

- A. In the event a conflict between this policy and the County Employees Retirement Law, the Public Employees' Pension Reform Act, or other applicable state or federal law arises, the law shall prevail.

**V. Policy Review**

- A. Staff shall review this Policy at least once every three years to ensure that it remains relevant, appropriate, and in compliance (*Ref.: Cal. Gov. Code. §31539, IRS Rev. Proc. 2016-51.*).

**VI. History**

12/13/2024                      Board Adopted Policy

**Certification of Board Adoption:**



Clerk of the Board

12/13/2024

Date