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January 2017 Mailer

## SACRAMENTO COUNTY EMPLOYEES' RETIREMENT SYSTEM ("SCERS") – ANNUAL REMINDER FOR RECIPIENTS OF MONTHLY BENEFIT PAYMENTS

1. **Tax Withholding Election** If you wish to change your tax withholding, you can print a copy of the SCERS Tax Withholding form any time by going to the SCERS web site, [www.scers.org](http://www.scers.org), and clicking the following links: Forms – Already Retired – Tax Withholding. Alternatively, you can request a hard copy of the Tax Withholding form by contacting our front-desk personnel at (916) 874-9119 or obtaining Form W-4P (Withholding Certificate for Pension or Annuity Payments) from an IRS Taxpayer Assistance Center or the IRS web site, [www.irs.gov](http://www.irs.gov). The completed form should be sent to the SCERS office at the address noted at the bottom of the page. If you do not want to change your current tax withholding, you do not need to request or submit a new form for the 2017 calendar year.
2. **Beneficiary Designation** Whether you are a retiree, survivor or former spouse receiving monthly benefits, you should have a designated beneficiary on record with SCERS. However, if your designated beneficiary predeceases you, you must notify us in writing. SCERS will then send a hard copy of the "Member's Affidavit" form for you to sign and return or, alternatively, provide directions for obtaining this form from the SCERS web site, [www.scers.org](http://www.scers.org).
3. **Address/Name/Marital Status Changes** If your name, address or marital status has changed since you last contacted SCERS, please notify us immediately. When we hear from you, SCERS will then send a hard copy of the "Member's Affidavit" form for you to sign and return or, alternatively, provide directions for obtaining this form from the SCERS web site, [www.scers.org](http://www.scers.org). [Please remember that SCERS directs the U.S. Postal Service not to forward mail to any addresses not on record with our office.]
4. **Medical & Dental Benefits** Questions regarding the County-sponsored medical and dental plans should be directed to the County's Employee Benefits Office at (916) 874-2020. Here are some things to remember:
  - a. Persons who marry after their SCERS retirement date and decide to enroll a new spouse in a County-sponsored medical and/or dental plan must do so within 30 days of the qualifying event. As part of this process, affected persons are required to complete spousal enrollment forms and provide copies of their marriage certificate.
  - b. You must notify the County's Employee Benefits Office if you or any covered dependent becomes entitled to Medicare within 30 days so you may be enrolled in a Medicare coordinated or advantage plan; otherwise, coverage may be cancelled.

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- c. If your spouse is covered by a County-sponsored medical and/or dental plan and predeceases you, you must notify the County's Employee Benefits Office in order to update your monthly premium amount and stop deductions for the former spouse.

As a reminder, please note that medical insurance premiums are paid in advance of the month of coverage. Accordingly, your December 2016 retirement advice will reflect any changes applied to medical insurance premiums and/or subsidies for the period beginning January 1, 2017.

- 5. **SCERS Web Site** The SCERS site contains items of interest to retired and active members, and is accessible from the Internet by going to the SCERS web site, [www.scers.org](http://www.scers.org).
- 6. **The Sacramento County Retired Employees' Association ("SCREA")** While SCERS is your retirement system, SCREA is your retirees association. In addition to organizing social gatherings for SCERS retirees, SCREA represents your interests before the Board of Retirement, the Board of Supervisors and the California State Legislature. If you wish to become a member of SCREA or inform them of a change in address, please call Sue Murray, Membership Chair, at (916) 359-6394 or write to SCREA at P.O. Box 573, Fair Oaks, CA 95628.
- 7. **Public Safety Officer Federal Income Tax Exclusion** Please note that federal tax law now allows certain retired 'public safety officers' to exclude up to \$3,000 in retirement benefit payments from their annual taxable income if the money was paid by the retirement system directly to qualified health insurance carriers to cover health insurance premium costs of the retiree. This federal income tax exclusion is found in Section 402(l) of the Internal Revenue Code. *If you believe you are eligible for the tax exclusion, you can print a copy of the Request Form anytime by going to the SCERS web site, [www.scers.org](http://www.scers.org), and clicking the following links: Important Notices – Important Information For Retired Public Safety Officers. Alternatively, you can request a hard copy by contacting our front-desk personnel at (916) 874-9119.*

If you already have a current Request To Receive Information Regarding Health Insurance Premiums Paid By SCERS On My Behalf Directly To Health Insurance Plans Form, you do not need to submit a new form for the 2017 calendar year.

On behalf of SCERS' Board of Retirement and administrative staff, we thank you for your continued cooperation and support. It is a pleasure to serve you.



John W. Gobel, Sr.  
Chief Benefits Officer



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Chief Executive Officer