

REQUEST FOR INFORMATIONAL LETTER/DOCUMENT



Member Information:

Print name: _____ Social Security Number: XXX-XX-_____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Date of Birth (MM-DD-YY): _____ Email: _____

Please select the document(s) you are requesting:

Copy of 1099-R; year(s) requested: _____

Copy of Pay Advice; month and year requested: _____

Award/Pension Verification Letter

Beneficiary Letter

Copy of most recent Annual Statement

Account Balance Statement

Note: SCERS only provides out-of-cycle account balance statements for necessary legal purposes. Annual Member Statements can be used for the purpose of providing proof of account balance and/or membership status for most purposes. If you are requesting an account balance statement to supply to a third-party using a specific date range, please submit a formal request from the third-party with your Request for Informational Letter or Document form for consideration.

Delivery method:

Mail (Documents will be mailed to the address SCERS has on file.)

Email (If email delivery is requested, this form must be completed with DocuSign or the completed form must be mailed or delivered to the SCERS office with an original signature.)

Member Signature:

Signature: _____ Date: _____

Please allow 5-7 days for processing all requests.