

***Stanislaus County Employees'  
Retirement Association***



**ESTIMATE REQUEST POLICY**

**Policy 3008**

March 4, 2016

**Purpose**

To manage the receipt and processing of service retirement estimate requests received by Stanislaus County Employees' Retirement Association (StanCERA).

**Authority**

Department Head Approval

**Procedure**

StanCERA staff may prepare service retirement estimates to members upon submission of requests, in writing. Estimates shall be prepared if the following criteria is met:

- Member is eligible to retire within five (5) years;
- Member has not submitted a request within six (6) months of previous estimate calculation;
- No more than three (3) dates may be submitted on request form; and
- Estimate will be calculated using information provided by member and current data StanCERA has in member's file.

*Tier 3 members must provide a Social Security Estimate for service retirement estimate to be calculated.*

StanCERA staff will calculate service retirement estimates utilizing salary information on file unless a different amount is provided by the member.

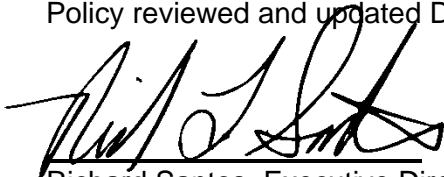
The estimate provided to the member by StanCERA does not constitute an official StanCERA retirement allowance, nor should it be relied upon as such. Estimates are based on the information provided by the employer on current data in the StanCERA member file and are not binding between the member and StanCERA. Actual retirement allowances, including any options available will be determined by StanCERA after application for retirement is received.

**Policy Review**

This policy shall be reviewed at least every three years.

**Policy History**

Policy reviewed and updated December 10, 2020.



Richard Santos, Executive Director

POLICY APPROVAL DATE: March 4, 2016