

## Supplemental Early Retirement Plan (SERP)

PUBLIC  
AGENCY  
RETIREMENT  
SERVICES

**PARS**

TRUSTED SOLUTIONS. LASTING RESULTS.

# SERP ENROLLMENT STEPS

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### 1. Receive SERP Packet:

- Read over the Plan Introduction and Plan Summary to gain a better understanding of the Supplemental Early Retirement Plan (SERP). Review your customized Benefit Illustration to see what benefit amounts you may receive if you enroll in the SERP.

### 2. Attend Orientation:

- Attend one of the identical group orientation meetings for information about the SERP. PARS will explain the structure of the plan, the different options available to you, how to complete the forms and when/how your benefit payments will be sent to you. Please bring any questions you may have.
- As an alternative to attending an in-person orientation, you may view the online SERP presentation by visiting <https://qrco.de/SDUUSD>.

### 3. If Retiring, Contact CalSTRS or CalPERS Regarding Your Pension:

- Since the SERP benefit may be in addition to your CalSTRS or CalPERS benefit, it is very important for you to contact CalSTRS or CalPERS to obtain an estimate of your benefits and find out what paperwork you need to complete in order to retire.
  - *If you are a member of CalPERS, the District has been informed by CalPERS that retirement applications cannot be accepted more than 120 days before the retirement date.*

### 4. Contact Social Security Regarding Applicable Benefits:

- If you are eligible for Social Security benefits, you need to contact Social Security to find out what steps you need to take in order to start collecting benefits.

### 5. If Enrolling, Hand-In Packet At PARS Walk-In Workshop:

- Walk-in workshops have been scheduled to allow you to submit your SERP enrollment forms and District Letter of Resignation directly to PARS. At these meetings, PARS representatives will sit with you one-on-one to review your SERP enrollment materials and hand you a receipt confirming your enrollment into the SERP (contingent on meeting all of the eligibility requirements).
- If you are unable to attend one of the walk-in workshops, you may send your enrollment packet directly to PARS via the following methods:
  - Fax to (877) 734-6220
  - Scan and email to [plansupport@pars.org](mailto:plansupport@pars.org)
  - Mail in the enclosed return envelope to be received by 5:00PM on January 15<sup>th</sup> (not postmarked)

## Contact us:

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Please contact the Plan Support Department with any questions at (800) 731-7884 or via email at [plansupport@pars.org](mailto:plansupport@pars.org).