



County Employees' Retirement Fund

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Clerk Bulletin

July 2010

Revised Forms

The Form 2B – Designation of Survivor, Form 2V – Termination Vested and Form 6 – Retirement Application were updated recently in the "Signature of Participant" section revising the forms to state they should be dated *at least 30, but not more than 90, days* rather than *more than 30 days and less than 90 days* prior to the commencement of benefits. The commencement date is determined by the date the member signs the termination vested form if they choose to commence benefits at the time they terminate county employment. Members who choose to commence benefits at a later date should sign the Form 2B or Form 6, depending on the date of their termination.

Note: The Form 2B is completed by the member if he/she terminated *after* January 1, 2000 and the Form 6 is completed by the member if he/she terminated *prior* to January 1, 2000, but only if the member has completed a minimum of eight years in an eligible position.

The Form M – Medical/Military/Other Leave was also updated by adding "As defined in the County's Written Medical Leave Policy" after the "Medical" check box. Check boxes for "FMLA" and "Worker's Compensation" under the "Medical" check box have also been added in order to provide us a better description of the type of medical leave the member is on. A "Required Attachment" for a copy of the written Medical Leave Policy the county has in place should accompany the Form M. By providing CERF with the written Medical Leave Policy at the time the employee is on leave we can review the policy for the period of time the member is allowed for Medical Leave in your county.

The revised forms are available on the web site or you may contact a Benefits Specialist to forward these forms to you. The following page is an updated list of all current versions of CERF Forms. We request you use the most recently revised version of all forms you submit to the CERF Administrative Office and discard any of the 'old' forms you have on hand.

Benefits Fairs, Open Enrollments, etc.

If your county holds Benefit Fairs, Open Enrollments, etc. during the year, CERF is eager to participate and be available for county employees to meet with us and ask any questions they might have regarding the CERF Pension Plan. As you well know, Jim Ellison, with Great West, visits the counties as often as possible and we could both coordinate our attendance at any county function you may have.

Your county may have several employees planning to terminate and commence benefits around the same time, and CERF is also willing to come to your county and speak to them about the procedure to commence benefits and the various annuity options.

Please consider inviting us to your county. We always appreciate the opportunity to speak on behalf of CERF so the county employees can obtain a better understanding of their retirement plan.

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CERF FORMS JULY 2010

Form 1	Enrollment	rev0410	Version 5.3
Form 1A	Beneficiary Designation \$10,000 Death Benefit	rev0309	Version 5.4
Form 2A	Refunds Payment Election	rev0410	Version 5.4
	Instructions for Form 2A Refunds Payment Election	rev1108	Version 5.2
Form 2B	Designation of Survivor	rev0710	Version 5.3
Form 2C	Co-Annuitant For 10-Year Certain	rev 0309	Version 5.2
Form 2N	Termination Non-Vested	rev 0909	Version 5.4
Form 2V	Termination Vested	rev0710	Version 5.6
Form 3A	Death Benefit-Non Spouse (\$10,000/Single, Vested) Payment Election	rev0309	Version 5.6
Form 3B	Death Benefit-Spouse (\$10,000) Payment Election	rev1108	Version 5.3
	Instructions for Forms 3A & 3B Death Benefits Payment Elections	rev1108	Version 5.3
Form 4	Change of Information	rev0410	Version 5.4
Form 5	Special Consultant	rev1108	Version 5.2
Form 6	Retirement Application	rev0710	Version 5.5
Form 8	Beneficiary Designation-Single Vested Death Benefit	rev0309	Version 5.3
Form 9	Application By Spouse	rev1108	Version 5.3
Form DE	County Deposit Exception	rev0805	Version 5.1
Form EFT	Electronic Funds Transfer	rev1105	Version 5.2
Form M	Medical/Military/Other Leave	rev0710	Version 5.4
Form SE	Seasonal Employee Notice	rev0309	Version 5.2
Form SV	Verification of Participant's Salary, Hours and Contributions	rev12010	Version 1.1