



Montana Public Employee Retirement Administration
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<http://mpera.mt.gov>

PUBLIC EMPLOYEES' RETIREMENT SYSTEM (PERS) OPTIONAL MEMBERSHIP ELECTION

This election must be completed by both employee and employer and received by MPERA within **90 days** of the employee's hire date or the employee waives membership. If any information in this form conflicts with statute or rule, the statute or rule will apply. If you have any questions about optional membership, please contact our office.

EMPLOYEE INFORMATION – to be completed by employee		
Last Name	First Name, MI	Social Security Number *
Date of Birth	Email Address	Phone Number
<p>Membership is optional only for certain new employees. (See optional positions below.) I understand the election is irrevocable. If you currently have a PERS account (already have contributions in PERS through this or any other agency), you cannot elect out of PERS. If you are a retired member of PERS, the working retiree restrictions apply. § 19-3-1106, MCA.</p> <p>If I elect PERS membership, I can only stop participating in PERS if I terminate my covered employment, and refund my contributions.</p> <p>If I decline membership</p> <ul style="list-style-type: none"> • If I decline membership, I may not become a member while still employed in this position. However, if I work more than 960 hours in a fiscal year, cumulative of all PERS employers, membership becomes mandatory and I must begin making retirement contributions. • If I decline membership, terminate employment, and become employed in another optional position within 30 days of termination, I may not become a member in the second optional position. • If I decline membership, terminate employment, and become employed in another optional position 30 days or more after my termination, I am allowed a new election. • If I decline membership, I will not receive membership service or service credit for employment for which membership was declined. • If I subsequently accept employment in a position for which retirement is mandatory, I must become a member regardless of this election. <p>I am not an active, inactive or retired member of PERS. I understand that I have the option to choose PERS membership due to employment with this agency.</p>		
<p><u>IRREVOCABLE ELECTION:</u></p> <p><input type="checkbox"/> I decline PERS membership</p> <p><input type="checkbox"/> I elect PERS membership (Please complete a PERS Membership Card / Designation of Beneficiary)</p>		
Employee Signature	Date	
EMPLOYER INFORMATION – to be completed by employer		
Employing Agency	Employer Number	Employee's Hire Date
<p>Please verify the above employee is eligible for optional membership. Working retirees, excluded employees and mandatory members are NOT eligible for an optional membership election. § 19-3-401,403 and 412, MCA.</p> <p>Check the type of optional position (you must check only one):</p> <p><input type="checkbox"/> Employee working 960 hours or less <input type="checkbox"/> Employee directly appointed by the Governor</p> <p><input type="checkbox"/> Chief administrative officer of a city or county <input type="checkbox"/> New employee of a county hospital or rest home.</p> <p><input type="checkbox"/> Legislative branch employee working 10 months or less to perform work related to the legislative session.</p>		
Printed Name	Title	Phone Number
Signature	Date	

Return completed form to MPERA within 90 days of hire. Retain a copy for your records.

* For identification and tax purposes. §19-2-403(7) MCA, 26 USC § 6041A and 6109