



MONTANA PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION

100 N PARK AVE STE 200 ~ PO BOX 200131
HELENA MT 59620-0131
(406) 444-3154 or toll free (877) 275-7372

PUBLIC EMPLOYEES' RETIREMENT SYSTEM (PERS)
OPTIONAL MEMBERSHIP ELECTION

This election must be completed legibly in ink, signed by both employee and employer, and received by MPERA within 90 days of hire date if hired on or after July 1, 2009.

To be completed by employer:

Employee Name (Print) Hire Date (Latest date employee started in this position)

- Membership is optional for certain new employees; check the category that applies to this covered position.
Non-member working 960 hours or less per fiscal year.
Employee directly appointed by the Governor.
Legislative branch employee working 10 months or less to perform work related to the legislative session.
Chief administrative officer of a city or county.
New employee of a county hospital or rest home.

Signature of Employer (required) Date Telephone Number

Agency Agency No.

To be completed by employee:

Only non-members have an election. If you are currently an ACTIVE or INACTIVE member of PERS (anyone with contributions in PERS through this or any other agency), you may not elect out of PERS. If you are a RETIRED member of PERS, other restrictions apply. Contact your payroll clerk for appropriate forms.

The following restrictions apply:

- If I decline membership, I may not become a member while still employed in this position. However, if I ultimately work more than 960 hours in a fiscal year, cumulative of all PERS employers, membership becomes mandatory and I must begin making retirement contributions starting with hour 961.
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.
If any information in this form conflicts with statute or rule, the statute or rule will apply.

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.

I decline PERS membership

I elect PERS membership (Complete a membership card and attach)

Signature of Employee (required) Date Social Security Number* Date of Birth

Return original to MPERA at above address. Employer must retain a copy.

*Mandatory for ID purposes § 19-2-403(7), MCA

MPERA Use:
Entered by
Date