

**PERS Tier One/Tier Two
 Alternate Payee Divorce Award of Payment Reduction or Deduction Method (Retired)**

Section A: Retiree and alternate payee (AP) information (Type or print clearly in dark ink.)

Member name	PERS number (optional)
AP name	<input type="checkbox"/> Reduction (AP pays taxes) <input type="checkbox"/> Deduction (member pays taxes)

Section B: AP award—reduction or deduction from retiree’s benefit

- The date of annulment, separation, divorce, or property settlement is _____. If no date is provided, PERS will use the date the judge signed the court order. (mm/dd/yyyy)
- Award to AP from member’s gross monthly benefit. (Choose one.)
 Percentage in up to two decimal points _____ **or** Monthly dollar amount \$_____.
- Limitations, if any. (Choose one.)
 The award is in effect for a specific time and will end _____ **or** (mm/dd/yyyy)
 The award is not to exceed \$ _____.
- Is the retiree allowed to change his/her beneficiary due to divorce? Yes No
 If yes, the retiree must submit a letter of request to PERS to change beneficiary. The request should include the full name of the new beneficiary, address, Social Security number (if available), and a copy of the new beneficiary’s proof of birth.
 Per ORS 238.465(2)(d), PERS can only change a survivor beneficiary after retirement due to divorce if the current beneficiary is the ex-spouse and the ex-spouse has been awarded an interest in the member’s retirement benefits.
 The monthly benefit amount may increase or decrease depending on the age of the new beneficiary. The change will be effective the first of the month after the month in which PERS receives a valid request to change the beneficiary, and it will be payable the first of the following month.
- If the retiree elected option 2A, 3A, L2A, L3A, is the retiree allowed to pop up to Option 1? Yes No

Section C: Death of the retiree or AP

If the retiree dies before the AP, the retiree elected a survivorship option, and the AP was the beneficiary designated by the retiree:

- The AP award is to be paid out of any monthly survivorship benefits or any one-time death benefit payment. Any remaining share not awarded to the AP will be paid to a beneficiary designated by the retiree (second beneficiary).
- The AP is the sole beneficiary.

If the retiree dies before the AP, the retiree elected a survivorship option, and someone other than the AP was the beneficiary designated by the retiree:

- The AP benefit continues as a reduction or deduction from the beneficiary’s gross monthly benefit or any one-time death benefit payment at the same amount noted in Section B.
- or**
- The AP benefit ends. The retiree’s beneficiary will receive 100 percent of the survivorship benefit or any one-time death benefit payment.

If the AP dies before the retiree:

- The AP benefit ends. The retiree will receive 100 percent of PERS benefits.
- The AP benefit is to be paid according to the most recent Designation of Beneficiary form filed by the AP; if none, then to the AP’s estate.

Additional information

Retirees and APs must track awards that have an end date or limitation. They must notify PERS 60 days before the award end date or dollar limitation.

If the retiree elected a survivorship option, all benefits end upon the death of the retiree and primary beneficiary.