



11410 SW 68th Parkway, Tigard OR 97223  
Mailing Address – PO Box 23700, Tigard OR 97281-3700  
Toll free – 888-320-7377 Fax – 503-598-0561  
Website – <https://oregon.gov/pers>

EXHIBIT \_\_\_\_\_

## Individual Account Program (IAP) Non-Retired Member Award of IAP Account to a Former Registered Domestic Partner (RDP)

### Section A: Member and former RDP information (Type or print clearly in dark ink.)

Member name	PERS ID (optional)
Former RDP name	

#### Former RDP information

- The former RDP's account will be established immediately prior to distribution.
- Distribution to the former RDP cannot occur until the member withdraws, retires or dies.
- If the member withdraws, the former RDP must immediately withdraw.
- If the member retires, the former RDP must immediately retire under the One-Time Lump-sum option.
- If the member dies, the former RDP must take immediate lump-sum distribution either as a withdrawal or as a retirement based on the member's retirement eligibility at death.
- If the former RDP dies before distribution, the former RDP's account will be paid in a one-time lump-sum death benefit when the member takes distribution or dies. The benefit will be paid to the beneficiary designated by the former RDP. If no beneficiary is designated, or the designated beneficiary does not survive the former RDP, the benefit is paid in the following order: former RDP's surviving spouse, former RDP's surviving children, former RDP's estate.
- **The benefit paid to the former RDP, or the former RDP's beneficiary, will be considered a distribution to the member, and the member will be liable for all taxes.**
- The administrative fee will be subtracted when the member and the former RDP receive their disbursement(s). The fee will be allocated between the member and the former RDP based on the percentage of the member account awarded.

### Section B: Award information

The member's account is reduced by a specified amount (as designated below), and the funds are transferred into a separate account in the former RDP's name.

1. The date of dissolution of registered domestic partnership is \_\_\_\_\_. This is the award date.  
(mm/dd/yyyy)

If an alternate award date should be used, provide the date here: \_\_\_\_\_. (Note: Future dates cannot be used.)  
If no dates are provided above, PERS will use the date the judge signed the court order as the award date.

The former RDP's separate account will be established from the member's account balance as of December 31 of the year prior to the award date. If the award date is December 31, the account will be established as of that date. If the award date is other than December 31, contributions made during that calendar year will not be included in the calculation of the former RDP's award.

2. Award to former RDP (Choose one.) If the former RDP is awarded a portion of the contributions the member made in the year of the dissolution, that must be factored into the below awarded amount or percentage.
- ☐ Percentage (up to two decimal places allowed) \_\_\_\_\_ %    **or**    ☐ Dollar amount \$ \_\_\_\_\_.

3. The above award includes a share of any vested optional employer contributions unless otherwise indicated below.
- ☐ Any vested optional employer contributions are NOT included in the above award.

In compliance with the Americans with Disabilities Act, PERS will provide help filling out this form upon request. You may request help by calling toll free 888-320-7377 or TTY 503-603-7766.