

# NONMEMBER SPOUSE RETIREMENT APPLICATION

NM-1258 (Rev. 06/11)

# CALSTRS

California State Teachers' Retirement System  
P.O. Box 15275, MS 3  
Sacramento, CA 95851-0275  
800-228-5453  
CalSTRS.com

This application is for a NONMEMBER SPOUSE ACCOUNT holder electing to receive a monthly retirement benefit. If you have a Defined Benefit Supplement (DBS) account, also submit a Nonmember Spouse DBS Application (form NM-1938).

With my signature below, I certify that I have read the instructions and I am applying for nonmember spouse retirement. I fully understand that if my retirement is approved by CalSTRS, I will be officially retired as of the retirement date I have requested if CalSTRS receives my properly completed, signed and dated application no later than the last day of the month in which I am requesting to retire.

PLEASE READ ALL INSTRUCTIONS ON THE REVERSE SIDE OF THIS APPLICATION

## Section 1: CalSTRS Member Account Cross Reference Information

NAME (LAST, FIRST, INITIAL)

CLIENT ID OR SOCIAL SECURITY NUMBER

## Section 2: Nonmember Spouse Account Holder Information

NAME (LAST, FIRST, INITIAL)

CLIENT ID\* OR SOCIAL SECURITY NUMBER

MAILING ADDRESS

DATE OF BIRTH (MM/DD/YYYY)

( ) ( )

CITY

STATE

ZIP CODE

HOME TELEPHONE

ALTERNATE TELEPHONE

E-MAIL ADDRESS

RETIREMENT DATE (MM/DD/YYYY)

## Section 3: Defined Benefit Supplement Account Information

- Check this box if you also have a Defined Benefit Supplement (DBS) account. You must include a completed Nonmember Spouse DBS Application (form NM-1938) along with this application.

## Section 4: Required Signature

### Signature

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I understand that perjury is punishable by imprisonment for up to four years (Penal Code section 126).

I understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in penalties, including restitution, up to one year in jail and a fine of up to \$5,000 (Education Code section 22010).



NONMEMBER SPOUSE SIGNATURE

SIGNATURE DATE (MM/DD/YYYY)

\*Find your client ID on your Retirement Progress Report.



NM 1258

# Nonmember Spouse Retirement Application-Instructions

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Print clearly in dark ink or type all information requested. Initial any corrections on the application. You may obtain a new copy of this application by visiting the CalSTRS Web Site at CalSTRS.com or contact us at 800-228-5453.

## SECTION 1- CALSTRS MEMBER ACCOUNT CROSS REFERENCE

Include name and Client ID number or Social Security number of the CalSTRS member.

## SECTION 2-NONMEMBER SPOUSE ACCOUNT INFORMATION

### Client ID or Social Security Number

Include your home and alternate telephone numbers and your e-mail address so we can contact you if we have any questions. Be sure your name on your application matches your name as it appears on your Social Security card. If you know it, include your Client ID instead of your Social Security number.

### Date of Birth

Your age in the month of your retirement is a factor used in calculating your retirement allowance. Since your vital information was verified through a certified court document, it is not necessary for you to provide vital documents with this application; however, should CalSTRS deem it necessary, documents may be requested.

### Retirement Date

You will be officially retired as of the date specified on your retirement application and subject to the following conditions:

- The retirement date you specify cannot exceed six months following the date you sign this application.
- CalSTRS must receive your application on or before the last day of the month in which you are requesting to retire.
- The earliest permissible retirement date is the Nonmember's 55<sup>th</sup> birthday.

An annual increase of 2% of your normal benefit will start the September following the anniversary of your retirement effective date.

## SECTION 3-DEFINED BENEFIT SUPPLEMENT ACCOUNT INFORMATION

If you also have a Defined Benefit Supplement account, you are required to also submit a Defined Benefit Supplement (DBS) Application (NM-1938). Check the box to indicate if this applies to you. If you are not sure if you have a DBS account, call CalSTRS.

## SECTION 4-REQUIRED SIGNATURE

Sign and date your *Nonmember Spouse Retirement Application* (form NM-1258).

## IMPORTANT INFORMATION

To cancel this retirement application, you must make your request in writing and it must be received by CalSTRS prior to your retirement date.

To have your monthly payment directly deposited to your financial institution, you must complete a *Direct Deposit Authorization* (form AS-1130), available at CalSTRS.com.

If you are also a member of California State Teachers' Retirement System and wish to apply for a retirement benefit of your member account, you must complete a *Service Retirement Application* (form SR-0059). You can request this application from your employer, by contacting CalSTRS, or at CalSTRS.com.

## TAX INFORMATION

Federal and California state laws require CalSTRS to withhold income tax on benefit payments unless you specify otherwise. You may specify your withholding by completing the *Income Tax Withholding Certificate* (form AD0908).

*Note: CalSTRS cannot provide specific tax information. Consult the Internal Revenue Service, the California Franchise Tax Board, or your qualified tax advisor for more information.*

## QUESTIONS?

E-mail us at CalSTRS.com/contactus, or contact us by phone at 800-228-5453.

## SEND YOUR COMPLETED FORMS TO

California State Teachers' Retirement System  
P.O. Box 15275  
Sacramento, CA 95851-0275

Visit the CalSTRS Web Site, CalSTRS.com for information, forms and publications.