



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>

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

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

Retiree name	PERS ID (optional)
Former RDP name	

Former RDP information

The retiree is receiving installment payments from the IAP account. Because an IAP account balance fluctuates month to month, only percentage awards are allowed. An IAP award to a former RDP is restricted to the Separate Account division method. This means the retiree's account is reduced by a specified percentage, and the funds are transferred into a separate account set up for the former RDP.

- **The benefit paid to the former RDP will be considered a distribution to the member, and the member will be liable for all taxes.**
- PERS will send the former RDP an application immediately.
- **The award must be immediately disbursed to the former RDP as a lump-sum payment.** The payment may be rollover eligible.
- If the former RDP dies before payment has been made, the former RDP's IAP award is to be paid immediately 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 percentage specified below will be applied to the IAP account balance as soon as administratively possible after PERS receives the final court order (with PERS forms referenced and attached) and PERS determines the court order is administrable for PERS purposes.
- The IAP balance could change between the award date and when PERS processes the award based on crediting of earnings or losses or payments made to the retiree based on the installment schedule specified at retirement.
- The administrative fee will be subtracted when the member and the former RDP receive their upcoming disbursements. The fee will be allocated between the member and the former RDP based on the percentage of the member account awarded.
- The retiree's installments will continue as scheduled.

Section B: Award information

Percentage of IAP awarded to the former RDP _____ % (may be reflected in up to two decimal places).

Date of dissolution of registered domestic partnership is _____. If no date is provided, PERS will use the date the judge signed the court order. (mm/dd/yyyy)

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.

EXHIBIT _____