

# REQUEST FOR INFORMATIONAL LETTER/DOCUMENT



## I. GENERAL INFORMATION

The Sacramento County Employees' Retirement System (SCERS) provides this form to facilitate requests for official letters or documents. Complete all required fields to ensure your request is processed accurately and promptly.

## II. RELEASE AUTHORIZATION

Print Full Name: \_\_\_\_\_ SSN: XXX-XX-\_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_ DOB (MM-DD-YYYY): \_\_\_\_\_

### Please select the document(s) you are requesting:

Copy of 1099-R; year(s) requested: \_\_\_\_\_

Copy of Pay Advice; month and year requested: \_\_\_\_\_

Award/Pension Verification Letter

Beneficiary Letter

Copy of most recent Annual Statement

Account Balance Statement

Note: SCERS only provides out-of-cycle account balance statements for necessary legal purposes. Annual Member Statements can be used for the purpose of providing proof of account balance and/or membership status for most purposes. If you are requesting an account balance statement to supply to a third-party using a specific date range, please submit a formal request from the third-party with your Request for Informational Letter or Document form for consideration.

### Delivery Method:

Mail (Documents will be mailed to the address SCERS has on file.)

Email (For email delivery, complete this form with DocuSign or submit it to SCERS with an original signature.)

\_\_\_\_\_  
Member Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

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