



California State Teachers' Retirement System
Legal Services, MS-03
P.O. Box 15275, Sacramento, CA 95851
Toll free: (800) 228-5453
Direct (916) 229-3766

INFORMATION AND INSTRUCTIONS

REQUEST FOR STATEMENT OF ACCOUNT AND/OR ESTIMATE OF BENEFITS DUE TO DISSOLUTION OF MARRIAGE LGL 722 (REV. 1/07) PAGE 1 OF 2

A request for a Statement of Account reflecting service credit, contributions, and interest accumulated during the marriage, and/or an Estimate of the Monthly Benefit payable to the member and former spouse will be completed within six weeks. *Please attach a complete copy of the court documents referring to the CalSTRS pension account, if available.* Legal Services will provide general estimates based on standard California Community Property laws. This information is provided as a courtesy and is intended to be used as a tool in determining the community property interest that may be due a former spouse, and the method of division to be used in dividing a member's account.

A request for information on a member's account will only be provided to the CalSTRS member, unless CalSTRS has been joined pursuant to Family Code section 2060, and Education Code 22656, or if one of the following forms of documentation is submitted: Written authorization to release information signed and dated by the member; or a properly submitted Subpoena for records.

Please complete the information on Page 2 (backside), sign where applicable, and return the completed form to the CalSTRS Legal Services office at the address listed above.



HOW WILL YOU SPEND YOUR FUTURE?

California State Teachers' Retirement System
Legal Services, MS-03
P.O. Box 15275, Sacramento, CA 95851
Toll free: (800) 228-5453
Direct (916) 229-3766

REQUEST FOR STATEMENT OF ACCOUNT
AND/OR ESTIMATE OF BENEFITS
DUE TO DISSOLUTION OF MARRIAGE
LGL 722 (REV. 1/07) PAGE 2 OF 2

I request: [] Statement of Account [] Estimate of the Monthly Benefit Amounts

Member's Name: _____ Client ID or SSN: _____
Member's Birth Date: ____/____/____ Former Spouse's Birth Date: ____/____/____
Date of Marriage: ____/____/____ Date of Separation: ____/____/____
*Estimated Date of Retirement: ____/____/____ Pre-retirement Option Election on file? [] Yes [] No
Additional Option Beneficiaries for Member's Share (Optional)
For an estimate with additional option beneficiaries other than the former spouse, you must specify the percentage allocated to each beneficiary you intend to elect. The member may retain all or a portion as Member-Only benefit. The total percentage amounts allocated to a former spouse, additional option beneficiaries, and any portion that may be retained as Member-Only benefit must not exceed 100%. This type of estimate would require the member to elect the Compound Option (formerly known as Option 8). Please be advised however, that under the 2007 Teachers' Retirement Law, not all members are eligible to make this type of election.
_____ % of member's remaining benefit to be retained as "Member-Only" benefit (if any)
Option # _____ for _____ % of member's benefit
(Name of option)
Name: _____ Relationship: _____ Birth Date: ____/____/____

[] Please check here if a court order is already on file with CalSTRS

Requestor's Name: _____ Phone Number: (____) _____ - _____

Requestor's Address: _____

Signature of Requestor: _____ Date: _____

